



CE SEMINARS

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We have been offering continuing education courses for over 30 years. These courses not only discuss substantive material but provide very practical ideas for financial advisors.

COURSE NAME	CREDITS	CHECK IF INTERESTED
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Questions Every Client Needs to Answer	1	
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This is the most popular course to motivate clients into action to address their estate and business planning. Participants will find this course pertinent, insightful and timely to their work.

Estate Planning

These courses cover Wills, Trusts, Living Wills, Patient Advocate Designations, Powers of Attorney, trust funding and avoiding Probate, as well as more advanced estate planning strategies such as gifting techniques, generation skipping, disclaimers, Domestic Asset Protection Trusts, sales to Defective Irrevocable Trusts, Grantor Retained Annuity Trusts and Charitable Giving.

Common Mistakes in Estate Planning	1	
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Estate Planning Strategies	1	
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Estate Planning and Millennials

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This course focuses on understanding the priorities and values of the millennial client. How will estate planning for millennials differ from planning for previous generations? What will motivate millennials to address their estate planning? In addition to basic estate planning, this course covers digital assets, planning goals concerning children and pets, student loans, charitable giving and related insurance sales opportunities.

IRAs and Retirement Plans

This course addresses the pros and cons of designating a spouse or children as direct beneficiaries. Should a Trust be designated as the beneficiary? Charity?

Required Minimum Distribution Rules	1	
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COURSE NAME**CREDITS****CHECK IF INTERESTED****Life Insurance**

This course focuses specifically on using life insurance in estate planning, buy sell planning and charitable giving. Irrevocable Trusts are covered. Split dollar arrangements are also addressed.

Creative Uses of Life Insurance 1

Estate Administration

This course addresses the steps necessary to administer an estate. Topics include filing the estate tax return, processing a probate matter, distributions to beneficiaries and income and estate tax elections.

How to Administer an Estate 1

Buy Sell Agreements

Succession planning is an important strategy for every business owner. This course covers buy sell agreements, as well as other business transfer techniques, especially in a family business context.

Buy Sell Agreements 1

Medicaid Planning Techniques 2

This seminar covers the rules to qualify for Medicaid and the techniques used to meet the requirements. This area of law has become increasingly important to the public.

Ethics 3

This course deals with the practical potential conflict of interest issues that confront professional financial advisors when they represent the husband and wife in an estate planning case or multiple owners of a closely held business. Who is your client? Husband? Wife? Majority or minority owner?

Ask us about our effective Client Appreciation Seminars

Contact me about a topic or client matter

Contact me about your seminars

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