Tax and Estate Planning Professional Education Seminars

Please join us for these informative sessions. 3 CPE and 3 CFP awarded for each seminar.
Instructor: Martin M. Shenkman, CPA, MBA, PFS, JD
Location: TEC-128 E&F

Hours: 7:30 – 8:00 a.m. Registration and Breakfast
8:00 – 11:00 a.m. Seminar and Discussion

Cost: $25 per seminar

CE 096 Post-Season Tax Update
May 10, 2011
Everyone anticipates substantial estate and income tax legislation. Whether or not these expected changes occur, there will undoubtedly be many tax developments in the first 4 months of 2011. This seminar will review recent tax developments and legislation updates for the beginning of the year.

CE 099 FLP and LLC Income Tax Planning Ideas
June 14, 2011
FLPs and LLCs, regardless of the changes in the income and estate taxes will remain significant planning tools for clients. Participants will examine the income tax issues of which all professional advisers need to be aware when planning for and working with client FLPs and LLCs.

CE 102 Tax and Estate Planning Tips and Techniques
July 12, 2011
Practical estate and financial planning checklists, useful to all practitioners and covering a wide range of estate and financial planning practice areas, will be presented and reviewed. All information will be updated for recent changes in the law.

New
CE 112 Estate Planning and Matrimonial Issues
August 16, 2011
Participants will learn about prenuptial, postnuptial, living-together agreements, the use of trusts, and more, all with a particular emphasis on creative and practical planning applications.