Save the Dates: 2015 Educational Events for Advisors

Advisor Webinar Series

Professional Advisor Webinars are intended to include 1.0 hr CPE for accountants with pre-registration.

January 21

"Using Life Insurance for Basis Step-Up and Estate Tax Savings,"
featuring Marvin Blum, JD, CPA
Wednesday, January 21, 2015 | 3:00 – 4:00 pm Eastern

April 22

"Planning for Very Large IRAs,"
featuring Robert Keebler, CPA/PFS, MST, AEP® (Distinguished)
Wednesday, April 22, 2015 | 3:00 – 4:00 pm Eastern

July 22

"Family and Charitable Planning, Especially with Retirement Assets,"
featuring Christopher Hoyt, JD
Wednesday, July 22, 2015 | 3:00 – 4:00 pm Eastern

November 11

"Planning for an Aging Population: Your Clients, Your Parents, and Someday You,"
featuring Bernard Krooks, JD, CPA, LL.M., CELA, AEP® (Distinguished)
Wednesday, November 11, 2015 | 3:00 – 4:00 pm Eastern

Special Events

Feldman Forum and Advisor Symposium are intended to offer CE, CLE and CPE with pre-registration (states and hours vary).

April 30

2015 Feldman Forum: "The New Planning Environment: Income Tax, Retirement, Estate & Business Strategies for Estates Under $10M."
The Feldman Forum is a four-hour continuing education event, which features top professionals from various areas of the legal and financial industry, including CPA Robert Keebler, Professor Craig Lemoine from The American College and Nautilus Member Agent Rick Austin.

November 12

2015 Advisor Symposium: "Issues of interest to advisors today."
The Advisor Symposium is a four-hour, continuing education event specifically designed for practicing attorneys, CPAs, and financial service professionals. This year's event features Professor Sam Donaldson, CPA Robert Keebler, New York Life Vice Chairman and Chief Investment Officer John Kim, and Nautilus Member Agent Michael Noland.

For registration information, please visit:
http://www.nyladvisors.com/upcoming-events

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