2018 Educational Events for Advisors

Professional Advisor Webinars are intended to include 1.0 hour of CPE credit with pre-registration.

	Date	Presenter
	**Jan. 17** 3-4 pm Eastern	**Robert S. Keebler, CPA/PFS, MST, AEP® (Distinguished)** **"Tax Reform – Helping High Net Worth Families"** Robert is a partner with Keebler & Associates, LLP, in Green Bay, WI, and a nationally recognized speaker on tax laws and regulations and how they can impact estate and business planning, helping professional advisors better serve their clients.
	**Apr. 18** 3-4 pm Eastern	**Steven J. Oshins, Esq., AEP® (Distinguished)** **"The Trump Tax Act: New Planning Opportunities"** A member of the Law Offices of Oshins & Associates, LLC, in Las Vegas, NV, Steve has been instrumental in shaping many of Nevada's estate planning and asset protection laws, including the law that allows a 365-year Dynasty Trust and the law that made Nevada the state with the largest valuation discounts.
	**Jul. 18** 3-4 pm Eastern	**James M. Duggan, MBA, JD** **"Entity Planning for Private Clients: Leveraging the Benefits of the Tax Cuts and Jobs Act"** Jim is a founding principal of DUGGAN BERTSCH, LLC, a Chicago-based business, tax, estate and wealth planning firm where he concentrates on business and corporate law and estate and wealth planning, primarily as they relate to closely held business interests and high net worth families.
	**Nov. 6** 1-5 pm Eastern	**"2018 Advisor Symposium: Honoring the Legend of Ben Feldman"** The Advisor Symposium is a four-hour long event and is intended to offer CPE, CLE, ICE, CFP, PACE/Professional Recertification with pre-registration (credit hours vary by state).
	**Nov. 14** 3-4 pm Eastern	**Bryan K. Clontz, Ph.D., CFP®, CLU®, ChFC®, CAP®, AEP®** **"Top Seven Deadly Charitable Planning Sins"** Bryan is the founder and president of Charitable Solutions, LLC, specializing in non-cash asset receipt and liquidation, gift annuity reinsurance and risk management, emergency assistance funds, and life insurance appraisals and audits. He also founded a national fund that allows employers to create emergency assistance and disaster relief funds for their employees.

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