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No	Program	Speaker	CEU	Location	Date	Cost	Time	Total
	Develop a Millionaire Mentality® Your 10 Keys To Success & Strategies to Survive the Economy	Rick Solano Educator & Author	.4	Lynnfield, Sheraton	Oct. 27	\$495	1-5	
			.4	Natick: Hampton	Nov. 17	\$495	1-5	
			.4	Wenham:FCE Ctr	Dec. 15	\$495	1-5	
	Medicaid Planning Update	Todd Lutsky, Esq. John Donahue, Esq.	.4	Lynnfield: Sherat	Oct. 27	\$245	9-1	
			.4	Natick: Hampton	Dec. 8	\$245	9-1	
	Certificate in Trust & Estate Planning®		---	All 4 \$895				
*1.	Trust Basics: (The Key to Understanding) Definitions/ Types of Trusts/ Case Study, etc..	Tim Borchers, Esq. EPLS, AEP	.4	Natick: Hampton	Oct. 18	\$245	9-1	
*2.	Estate Planning: Intermed/Advanced Practical examples included.	Leo Cushing, Esq., CPA	.6	Natick: Hampton	Dec. 6	\$245	9-3	
*3.	Fed & Mass Issues (706 & M706): With Practical Example & Estate Planning Essentials	Todd Lutsky, Esq.	.4	Natick: Hampton	Nov. 17	\$245	9-1	
*4.	Income Tax/Prep. Fiduciary Returns Administration, Examples, Filled-in 1041 Forms	Leo Cushing, Esq., CPA	.4	Natick: Hampton	Dec. 14	\$245	9-1	
	Employee Benefits & Pension Update: Including Plan Termination and RMD	Joseph Scardino, Esq.	.4	Natick: Hampton	Dec. 14	\$245	1-5	
	Year End Tax Planning:							
*	2017 Federal Tax Update (Speaker slides & PDF downloadable containing the substantial 14 - Chapter Manual)	Mark Merric, Esq, CPA or Isaac L. Lodico, Esq.	.8	Albany: Marriott	Nov. 13	\$255	8:30 to 4:30	
			.8	Needham: Sherat	Nov. 17	\$255		
			.8	Woburn: Crown	Dec. 4	\$255		
			.8	Prov: Hilton	Dec. 5	\$255		
			.8	Hart: Holiday E	Dec. 6	\$255		
			.8	Newton: Marriott	Jan. 9	\$255		
*	Ethics (Mandatory Compliance)	Rick Solano	.4	Wenham:FCE Ctr	Dec. 15	\$195	9-1	

*Qualifies with the IRS Director of Practice for Credit

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