

Foundation for Continuing Education, Inc.

2019 Fall Reservation Form *(Save for Future Reference)*

Certificate in Trust & Estate Planning® - Special: 2 or more \$795.00 each.

Mail to P. O. Box 458, Wenham, MA 01984 - Or Call Adele at (978) 468-6528 or FAX (978) 468-2573

No	Program	Speaker	CEU	Location	Date	Cost	Time	Total
	Develop a Millionaire Mentality® Your 10 Keys To Success. How to Take Control of Your Life!	Rick Solano Educator & Author	.4 .4	Lynnfield: 210 Broadway Wenham: 64 Pleasant St.	First Monday <i>Of Month</i> Second Monday	\$1,250 \$1,250	11-3 11-3	
	Medicaid Planning Update	Todd Lutsky, Esq.	.4 .4	Lynnfield: Sherat Natick: Marriot	Sept. 27 Dec. 6	\$275 \$275	9-1 9-1	
Certificate in Trust & Estate Planning® --- All 4 for \$895								
*1.	Trust Basics: (The Key to Understanding) Definitions/ Types of Trusts/ Case Study, etc..	Tim Borchers, Esq. EPLS, AEP	.4	Woburn: Crown Plaza	Oct. 23	\$245	9-1	
*2.	Estate Planning: Intermed/ Advanced: Review of basics and numerous examples.	Leo Cushing, Esq., CPA	.4	Woburn: Crown Plaza	Nov. 13	\$245	9-1	
*3.	Fed & Mass Issues (706 & M706): Estate Planning Essentials with case study.	Todd Lutsky, Esq.	.4	Woburn: Crown Plaza	Nov. 1	\$245	9-1	
*4.	Income Tax/Prep. of Fiduciary Returns Administration, Examples, Filled-in 1041 Forms	Leo Cushing, Esq., CPA	.4	Woburn: Crown Plaza	Nov. 15	\$245	9-1	
	Pension Plan Hot Issues: Overlooked Form 990 Rules, Plan terminations, and Required Minimum	Joseph Scardino, Esq.	.4	Woburn: Crown Plaza	Nov. 15	\$245	1-5	
Year End Tax Planning:								
*	2019 Federal Tax Update (Speaker slides & PDF downloadable containing the substantial 14 -Chapter Manual)	Mark Merric, Esq, CPA or Isaac L. Lodico, Esq.	.8 .8 .8 .8 .8 .8	Albany: Marriott Needham: Sherat Woburn: Crown Prov: Hilton Hart: Holiday E Newton: Marriott	Nov. 18 Nov. 22 Dec. 9 Dec. 10 Dec. 11 Jan. 7	\$255 \$255 \$255 \$255 \$255 \$255	8:30 to 4:30	
*	Ethics (Mandatory Compliance)	Rick Solano	.4	Wenham: 64 Pleasant St	Dec. 30	\$195	9-1	

*Qualifies with the IRS Director of Practice for Credit

Total: \$ _____

Name of Company: _____ Phone: _____

Address: _____ Fax: _____

Name(s) of Attendee(s): _____ Email: _____

The Foundation For Continuing Education, Inc. (www.Fce.org) 64 Pleasant St. - P.O. Box 458 - Wenham, MA 01984

Tel. 978-468-6528 - FAX 978-468-2573



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