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No	Program	Speaker	CEU	Location	Date	Cost	Time	Total
	Medicaid Planning Update - 2019	Todd Lutsky, Esq.	.4 .4 .4	Randolph:Lantana Andover:Marriott Natick: Hampton	Mar 15 April 26 May 31	\$275 \$275 \$275	9-1 9-1 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	May 29	\$245	9-1	
*2.	Estate Planning: Intermed/Advanced	Leo Cushing, Esq., CPA	.6	Natick: Hampton	June 4	\$245	9-3	
*3.	Fed & Mass Issues (706 & M706): With Practical Example & Estate Planning Essentials	Todd Lutsky, Esq	.4	Natick: Hampton	June 11	\$245	9-1	
*4.	Income Tax/Prep. Fiduciary Returns Administration, Examples, Filled-in 1041 Forms	Leo Cushing, Esq., CPA	.4	Natick: Hampton	June 13	\$245	9-1	
Tax & Financial Conference Any 3 for \$695								
1.	Develop a Millionaire Mentality® Your 10 Keys To Success	Rick Solano Author & Educator	.4 .4 .4 .4	Lynnfield Woods Lynnfield Woods Wenham: FCE Ctr. Wenham: FCE Ctr.	March 22 April 19 May 17 June 19	\$495 \$495 \$495 \$495	9-1 9-1 1-5 1-5	
2.	2019 Investment Outlook: Including Methods of Stock Selection	John Dorfman, Dorfman Value Fund	.2	Natick: Hampton	June 4	\$245	3-5	
3.	Financial Planning Update: Insurance Planning, Tax Planning, Investment Planning, Retirement, etc.	John Laurito, CFP, ChFC, CRPC Paul Adams, MBA	.4	Natick: Hampton Wenham:FCE Ctr. .	May 29 June 19	\$245 \$245	1-5 9-1	
4.	Employee Benefits & Pension Update: Including Plan Termination & RMD	Joseph Scardino, Esq.	.4	Natick: Hampton	June 13	\$245	1-5	
5.	Tax Practice Update: Federal and Mass	Dan Doherty, Esq., CPA	.4	Wenham: FCE Ctr.	June 19	\$245	9-1	
6.*	Ethics: Mandatory Compliance	Rick Solano	.4	Wenham:FCE Ctr	June 28	\$195	9-1	
7.*	2019 Federal Tax Update (Speaker slides & PDF downloadable containing the substantial 14 Chapter Manual when available)	Mark Merric, Esq, CPA or Isaac L. Lodico, Esq.	.8 .8	Prov: Hilton Newton: Marriott	Dec. 3 Jan. 7	\$255 \$255	8:30 to 4:30	

*Qualifies with the IRS Director of Practice for Credit Check Enclosed _____ TOTAL _____

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