

FOUNDATION FOR CONTINUING EDUCATION

2020 Spring Reservation Form (Save for Future Reference)

No Live Programs until after Labor Day, Except for "Your 10 Keys to Success" - By Appointment

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

No	Program	Speaker	CEU	Location	Date	Cost	Time	Total
	Develop a Millionaire Mentality® Your 10 Keys To Success, Increase Business, Improve Investments, Take control of your Life, Your mindset matters!	Rick Solano Author & Educator	.4	<u>Lynnfield:</u>	By Appointment	\$695	9-1	
.4			210 Broadway	\$695		9-1		
.4			<u>Wenham:</u>	\$695		9-1		
.4			64 Pleasant St.	\$695		9-1		
	Medicaid Planning Update - 2020 (Includes 1,000 pg Survival Guide)	Todd Lutsky, Esq.	.4	Randolph:Lantana	TBA	\$275	9-1	
.4			Andover:Marriott	\$275		9-1		
.4			Natick: Marriott	\$275		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	Randolph: Lantana	TBA	\$245	9-1	
*2	Estate Planning: Intermed/ Advanced	Leo Cushing, Esq., CPA	.4	Randolph: Lantana	TBA	\$245	9-1	
*3	Fed & Mass Issues (706 & M706): With Practical Example & Estate Planning Essentials	Todd Lutsky, Esq	.4	Randolph: Lantana	TBA	\$245	9-1	
*4	Income Tax/Prep. Fiduciary Returns Administration, Examples, Filled-in 1041 Forms	Leo Cushing, Esq., CPA	.4	Randolph: Lantana	TBA	\$245	9-1	
Tax & Financial Conference								
	2020 Investment Outlook: Including Methods of Stock Selection	John Dorfman, Dorfman Value Fund	.2	Randolph: Lantana	TBA	\$245	1-3	
	Employee Benefits & Pension Update: 990 Issues, Plan termination, RMD, etc.	Joseph Scardino, Esq.	.4	Randolph: Lantana	TBA	\$245	1-5	
	Tax Practice Update: Federal and Mass	Dan Doherty, Esq., CPA	.4	Wenham: FCE Ctr.	TBA	\$245	9-1	
	Financial Planning Update: Tax Planning, Investment Planning, Estate Planning, Retirement, etc.	Rick Solano Author & Educator	.4	Wenham:FCE Ctr.	TBA	\$245	1-5	
	Ethics: Mandatory Compliance	Rick Solano	.4	Wenham:FCE Ctr	TBA	\$195	9-1	
*	2020 Federal Tax Update (Speaker slides & PDF downloadable containing the 14 Chapter Manual).	Mark Merric, Esq, CPA or Isaac L. Lodico, Esq.	.8 .8 .8 .8 .8	Albany: Marriott Needham: Sherat Woburn: Crown Prov: Hilton Newton: Marriott	Nov. 9 Nov. 16 Nov. 30 Dec. 1 Jan. 4	\$255 \$255 \$255 \$255 \$255	8:30 to 4:30	

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

Name of Company: _____ PHONE _____

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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



APPROVED
CONTINUING EDUCATION
PROVIDER

Programs are designed to Qualify for CPE Credit Under Rules Promulgated by the State Boards of Accountancy, State Bar Associations, The Director of Practice IRS & the Institute of Certified Bankers.

To be removed from this fax list, please call 1-800-474-2882 or fax back to 978-468-2573.