

FOUNDATION FOR CONTINUING EDUCATION

2024 Reservation Form (Save for Future Reference)

Mail to POBox 458, Wenham, MA 01984, Call Adele at (978) 468-6528, 617-901-9772 or FAX to (978) 468-2573

No	Program	Speaker	CEU	Location	Date	Cost	Time	Total
	Strategies to Survive and Prosper: Wealth Protection, Your Family, Your Business, Your Retirement, Your Investments, etc.	Rick Solano, CPA Author & Educator	.4	Lynnfield: 210 Broadway Wenham: 64 Pleasant St.	By Appointment Only	\$695	9-5	
	How to Develop a Millionaire Mentality ®	Rick Solano, CPA Author & Educator	.8	Same as above	Same as above	\$950	9-5	
	Your 10 Keys to Success	Rick Solano, CPA Author & Educator	.4	Same as above	Same as above	\$495	9-1	
	Medicaid Planning Update (Includes 1,000 pg Survival Guide)	Todd Lutsky, Esq. Tom McKinnon, Esq.	.4	Natick: Marriott Residence Inn	March 26	\$325	9-1	
	<u>Certificate in Trust & Estate Planning ®</u>		---	All 4 \$950				
1	Trust Basics: (The Key to Understanding) Definitions/ Types of Trusts/ Case Study, etc..	Tim Borchers, Esq., EPLS, AEP	.4	Natick: Marriott Court	June 3	\$275	9-1	
2	Estate Planning: Intermed/Advanced Review of Basics & Numerous examples	Leo Cushing, Esq., CPA	.4	Natick: Marriott Court	TBA	\$295	9-1	
3	Fed & Mass Issues (706 & M706): With Practical Example & Estate Planning Essentials	Todd Lutsky, Esq	.4	Natick: Marriott Court	June 4	\$295	9-1	
4	Income Tax/Prep. Fiduciary Returns Administration, Examples, Filled-in 1041 Forms	Leo Cushing, Esq., CPA	.4	Natick: Marriott Court	TBA	\$295	9-1	
	<u>Tax & Financial Conference</u>							
1	<u>2024/5 Investment Outlook:</u> Including Methods of Stock Selection	John Dorfman, Dorfman Value Fund	.2	Wenham: FCE Ctr.	June 27	\$275	9-1	
2	<u>Employee Benefits & Pension Update:</u> 990 Issues, Plan termination, RMD, etc.	Joseph Scardino, Esq.	.4	Wenham: FCE Ctr.	June 27	\$275	1-5	
3	<u>Tax Practice Update:</u> Federal and Mass	Dan Doherty, Esq., CPA	.4	Wenham: FCE Ctr.	TBA	\$295	9-1	
4	<u>Executive Financial Planning :</u> Tax Planning, Investment Planning, etc.	Rick Solano, CPA Author & Educator	.4	Wenham: FCE Ctr.	June 28	\$295	9-1	
	Ethics: Mandatory Compliance	Rick Solano, CPA Author & Educator	.4	Wenham: FCE Ctr	June 28	\$245	1-5	

____ 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 - 617-901-9772 - FAX 978-468-2573

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