

# 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
	<b>Strategies to Survive and Prosper:</b> Wealth Protection, Your Family, Your Business, Your Retirement, Your Investments, Bitcoin, etc.	<b>Rick Solano, CPA</b> Author & Educator	.4	<b>Lynnfield:</b> 210 Broadway <b>Wenham:</b> 64 Pleasant St.	<b>By</b> <b>Appointment</b> <b>Only</b>	\$695	9-1	
	<b>Medicaid Planning Update</b> (Includes 1,000+ pgs. Survival Guide)	<b>Todd Lutsky, Esq.</b> <b>Tom McKinnon, Esq.</b>	.4	<b>Natick: Marriott</b> <b>Residence Inn</b> <b>Andover:</b> <b>Marriott Court</b>	<b>Nov. 12</b>  <b>TBA</b>	\$325  \$325	9-1  9-1	
	<b>Certificate in Trust &amp; Estate Planning ®</b>		---	<b>All 4 \$950</b>				
1	<b>Trust Basics: (The Key to Understanding)</b> Definitions/ Types of Trusts/ Case Study, etc..	<b>Tim Borchers,</b> <b>Esq., EPLS, AEP</b>	.4	<b>Natick:Marriott</b> <b>Residence Inn</b>	<b>Dec. 2</b>	\$295	9-1	
2	<b>Estate Planning: Intermed/Advanced</b> <b>Review of Basics &amp; Numerous examples</b>	<b>Leo Cushing,</b> <b>Esq., CPA</b>	.4	<b>Natick:Marriott</b> <b>Residence Inn</b>	<b>TBA</b>	\$295	9-1	
3	<b>Fed &amp; Mass Issues (706 &amp; M706):</b> With Practical Example & Estate Planning Essentials	<b>Todd Lutsky, Esq</b>	.4	<b>Natick:Marriott</b> <b>Residence Inn</b>	<b>Dec. 3</b>	\$295	9-1	
4	<b>Income Tax/Prep. Fiduciary Returns</b> Administration, Examples, Filled-in 1041 Forms	<b>Leo Cushing,</b> <b>Esq., CPA</b>	.4	<b>Natick:Marriott</b> <b>Residence Inn</b>	<b>TBA</b>	\$295	9-1	
	<b>Tax &amp; Financial Conference</b>							
1	<b>2024/5 Investment Outlook:</b> Including Methods of Stock Selection	<b>John Dorfman,</b> <b>Dorfman Value Fund</b>	.2	<b>Wenham:</b> <b>FCE Ctr.</b>	<b>Nov. 15</b>	\$295	9-1	
2	<b>Employee Benefits &amp; Pension Update:</b> 990 Issues, Plan termination, RMD, etc.	<b>Joseph Scardino,</b> <b>Esq.</b>	.4	<b>Wenham:</b> <b>FCE Ctr.</b>	<b>Nov. 15</b>	\$295	1-5	
3	<b>Tax Practice Update:</b> <b>Federal and Mass</b>	<b>Dan Doherty,</b> <b>Esq., CPA</b>	.4	<b>Wenham:</b> <b>FCE Ctr.</b>	<b>TBA</b>	\$295	9-1	
4	<b>Executive Financial Planning :</b> Tax Planning, Investment Planning, etc.	<b>Rick Solano, CPA</b> Author & Educator	.4	<b>Wenham:</b> <b>FCE Ctr.</b>	<b>Dec. 20</b>	\$295	9-1	
	<b>Ethics: Mandatory Compliance</b>	<b>Rick Solano, CPA</b> Author & Educator	.4	<b>Wenham:</b> <b>FCE Ctr</b>	<b>Dec. 20</b>	\$245	1-5	

\_\_\_\_\_ Check enclosed      TOTAL \_\_\_\_\_

Name of Company: \_\_\_\_\_ PHONE \_\_\_\_\_

Address: \_\_\_\_\_ FAX \_\_\_\_\_

Name(s) of Attendee(s): \_\_\_\_\_ EMAIL \_\_\_\_\_

The Foundation For Continuing Education, Inc. ([www.Fce.org](http://www.Fce.org))

64 Pleasant St. - P.O. Box 458 - Wenham, MA 01984 Tel. 978-468-6528 - 617-901-9772 - FAX 978-468-2573

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

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