

# FOUNDATION FOR CONTINUING EDUCATION

## 2025 Spring/Summer Reservation Form (Save for Future Reference)

*Mail to P.O.Box 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><u>Strategies to Survive and Prosper:</u></b> Wealth Protection, Your Family, Your Business, Your Retirement, Your Investments, Bitcoin, etc.	Rick Solano Executive Business & Personal Coach	.4	<b>Lynnfield:</b> 210 Broadway  <b>Wenham:</b> 64 Pleasant St	<b>By</b> <b><u>Appointment</u></b>	\$950	10-2	
	<b><u>Certificate in Trust &amp; Estate</u></b>	<b><u>Planning ®</u></b>	---	<b><u>Any 4 \$1195</u></b>				
1.	<b>Medicaid Planning Update</b> (Includes 1,000+ pgs. Survival Guide) (Estate Planning for the Middle Class)	Todd Lutsky, Esq Tom McKinnon, Esq.	.4 .4	Natick: Marriott Residence Inn  Andover: Marriott Court	March 25  May 13	\$395 \$395	9-1 9-1	
2.	<b>Trust Basics:</b> (The Key to Understanding) Definitions/ Types of Trusts/ Case Study, etc..	Tim Borchers, Esq., EPLS, AEP	.4	Natick:Marriott Residence Inn	May 19	\$295	9-1	
3.	<b>Trust Administration – How to be a Good Trustee and How to Add Fiduciary Services to your Practice.</b>	Tim Borchers, Esq., EPLS, AEP	.4	Natick:Marriott Residence Inn	May 19	\$295	1-5	
4.	<b>Income Taxation Trusts &amp; Estates: Preparing 1041's – Return Examples</b>	Leo Cushing, Esq., CPA	.4	Natick:Marriott Residence Inn	May 23	\$295	9-1	
5.	<b>Income Taxation Trusts &amp; Estates: The Probate Process</b>	Rich Woodwell, Esq,	.4	Natick:Marriott Residence Inn	May 23	\$295	1-5	
6.	<b>Fed &amp; Mass Issues (706 &amp; M706):</b> With Practical Example & Estate Planning Essentials	Todd Lutsky, Esq.	.4	Natick:Marriott Residence Inn	June 10	\$325	9-1	
7.	<b>Estate Planning: Intermediate Issues you must consider in your Practice</b>	Mike Monteforte, Esq.	.4	Natick:Marriott Residence Inn	June 13	\$295	9-1	
	<b><u>Tax &amp; Financial Conference</u></b>							
1	<b><u>2025/6 Investment Outlook:</u></b> Including Methods of Stock Selection	John Dorfman, Dorfman Value Fund	.2	Wenham: FCE Ctr.	TBA	\$295	9-1	
2	<b><u>Employee Benefits &amp; Pension Update:</u></b> 990 Issues, Plan termination, RMD, etc.	Joseph Scardino, Esq.	.4	Wenham: FCE Ctr.	June 25	\$295	9-1	
3	<b><u>Tax Practice Update:</u></b> Federal and Mass	Dan Doherty, Esq., CPA	.4	Wenham: FCE Ctr.	TBA	\$295	9-1	
4	<b><u>Executive Financial Planning :</u></b> Tax Planning, Investment Planning, etc.	David Carleton CPA	.4	Wenham: FCE Ctr.	June 25	\$295	1-5	
	<b>Ethics: Mandatory Compliance</b>	Rick Solano, Educator	.4	Wenham: FCECtr	June 27	\$245	9-1	

\_\_\_\_\_ 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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