

FOUNDATION FOR CONTINUING EDUCATION

2026 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
	<u>Strategies to Survive and Prosper:</u> Wealth Protection, Your Family, Your Business, Your Retirement, Your Investments, etc.	Rick Solano Executive Business & Personal Coach	.4	<u>Lynnfield:</u> 210 Broadway <u>Wenham:</u> 64 Pleasant St	<u>By</u> <u>Appointment</u>	\$950	10-2	
	<u>Certificate in Trust & Estate</u>	<u>Planning ®</u>	---	<u>Any 4 \$1050</u>				
1.	Medicaid Planning Update (Includes 1,000+ pgs. Survival Guide) (Estate Planning for the Middle Class)	Todd Lutsky, Esq. Tom McKinnon, Esq.	.4	Natick: Marriott Courtyard	May 19	\$345	9-1	
2.	Trust Basics: (The Key to Understanding) Definitions/ Types of Trusts/ Case Study, etc..	Tim Borchers, Esq., EPLS, AEP	.4	Natick: Marriott Courtyard	June 2	\$295	9-1	
3.	Trust Administration – How to be a Good Trustee and How to Add Fiduciary Services to your Practice.	Tim Borchers, Esq., EPLS, AEP	.4	Natick: Marriott Courtyard	June 9	\$295	9-1	
4.	Fed & Mass Issues (706 & M706): With Practical Example & Estate Planning Essentials	Todd Lutsky, Esq.	.4	Natick: Marriott Courtyard	May 12	\$325	9-1	
5.	Income Taxation Trusts & Estates: Preparing 1041's – Return Examples	Leo Cushing, Esq., CPA	.4	Natick: Marriott Courtyard	TBA	\$295	9-1	
6.	Income Taxation Trusts & Estates: Understanding the Probate Process	Rich Woodwell, Esq.,	.4	Natick: Marriott Courtyard	TBA	\$325	1-5	
7.	Estate Planning: Intermediate Issues you must consider in your Practice	Mike Monteforte, Esq.	.4	Natick: Marriott Courtyard	TBA	\$295	9-1	
	<u>Tax & Financial Conference</u>							
1	<u>2026/7 Investment Outlook:</u> Including Methods of Stock Selection	John Dorfman, Dorfman Value Fund	.2	Wenham: FCE Ctr.	TBA	\$295	9-1	
2	<u>Employee Benefits & Pension Update:</u> 990 Issues, Plan termination, RMD, etc.	Joseph Scardino, Esq.	.4	Wenham: FCE Ctr.	June 25	\$295	9-1	
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.	David Carleton CPA	.4	Wenham: FCE Ctr.	June 25	\$295	1-5	
	Ethics: Mandatory Compliance	Rick Solano, Educator	.4	Wenham: FCE Ctr.	June 30	\$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)

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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