FOUNDATION FOR CONTINUING EDUCATION

2026 Fall/Winter Reservation Form (Save for Future Reference)

Mail to P.O.Box 458, Wenham, MA 01984, Call (978) 468-6528, 617-901-9772 or FAX to (978) 468-2573

No	Program	Speaker	CEU	Location	Date	Cost	Time	Total
	Certificate in Trust & Estate Planning ®		---	**Any 4 $1050**				
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	Nov. 10	$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	Nov. 5	$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	Dec. 8	$295	9-1	
4.	**Fed & Mass Issues (706 & M706):** With Practical Example & Estate Planning Essentials	Todd Lutsky, Esq.	.4	Natick: Marriott Courtyard	Dec.15	$325	9-1	
5.	**Estate Planning: Intermediate** Issues you must consider in your Practice	Mike Monteforte, Esq.	.4	Natick: Marriott Courtyard	Nov. 19	$295	9-1	
6.	**Income Taxation Trusts & Estates:** Preparing 1041's – Return Examples	Leo Cushing, Esq., CPA	.4	Natick: Marriott Courtyard	TBA	$295	9-1	
7.	**Income Taxation Trusts & Estates:** Understanding the Probate Process	Rich Woodwell, Esq.	.4	Natick: Marriott Courtyard	TBA	$325	1-5	
	Tax & Financial Conference							
1.	**2026/7 Investment Outlook:** Including Methods of Stock Selection	John Dorfman, Dorfman Value Fund	.2	Wenham: FCE Ctr.	TBA	$295	9-1	
2.	**Employee Benefits & Pension Update:** 990 Issues, Plan termination, RMD, etc.	Joseph Scardino, Esq.	.4	Wenham: FCE Ctr.	Dec. 17	$295	9-1	
3.	**Tax Practice Update:** Federal and Mass	Dan Doherty, Esq., CPA	.4	Wenham: FCE Ctr.	TBA	$295	9-1	
4.	**Executive Financial Planning:** Tax Planning, Investment Planning, etc.	David Carleton CPA	.4	Wenham: FCE Ctr.	Dec. 17	$295	1-5	

_____Check enclosed TOTAL _____

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The Foundation For Continuing Education, Inc. (www.Fce.org)
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