The AICPA | PFP Division presents:

Protecting You and Your Loved Ones: Practical and Vital Estate Planning Information For Consumers in Plain English

Tuesday, October 18, 2011 2:30 pm
Eastern Daylight Time (New York, GMT-04:00)

Duration: 1 hour

Speakers: Martin Shenkman, CPA, MBA, AEP, PFS, JD Lisa Featherngill, CPA/PFS

Consumers must take proactive steps to protect themselves and their loved ones. Estate planning integrates financial planning, retirement planning, planning for disability and health issues. A common misconception about estate planning is that it is something only wealthy individuals should do before they die. However, estate planning is an important part of life, regardless of wealth. Planning for the protection of your assets and passing them to your heirs is an essential process and one that should be undertaken with your most trusted advisor, your CPA financial planner.

In this web seminar, Martin Shenkman, CPA, PFS will lead you in a practical and understandable discussion of key estate planning concepts that affect everyone, including:

- Steps in the estate planning process
- Building blocks of your estate plan: Documents, Insurance, Financial Planning, and Special Issues
- Estate planning with regard to charitable giving and chronic illness
- How your CPA financial planner can simplify your estate planning and save you time and money

This is a free, one-hour seminar. Continuing education credit is not being offered for this event.

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