

Thursday Insights for August 2008

2:30 p.m. – 4:00 p.m.

Thursday, August 7, 2008:

Business Owner Planning Tools: Understanding non-qualified deferred compensation and when it is appropriate to use.

with Gregory Banner, CFP, CLU, and Sherry Flint, Advanced Planning-Regional Vice President

Deferred compensation can be a great planning tool for the business owner. Unfortunately, because of its complexity many people avoid it. Greg and Sherry will teach you the basics of deferred compensation and how to spot when it could be a great planning tool for your client

Thursday, August 14, 2008:

The 3 Doors of Estate Planning

with John L. Jenkins, AEP, CSA, EA, CFP®, and Stephen J. Mancini, Esq.

This workshop will explore the 3 doors of estate planning: family; charity; and IRS. It will point out that client estates normally go through only two of the three doors - the ones they choose either consciously (through planning) or unconsciously (without planning). We will further demonstrate the planning strategies available to maximize the benefits to families and minimize if not completely zero-out the benefit to the IRS.

Thursday, August 21, 2008:

Captive Insurance Companies

with Stephen J. Mancini, Esq., and Rodney J. Hatley, Esq.

Business Owners have both insurable and uninsurable risks. Pre-tax funds can be set aside into an entity to cover such risks while offering creditor protection. Understand the types of businesses that may benefit from this option and the strategies involved.

Thursday, August 28, 2008:

Are You Referable: The Practice Experience

with Joseph J. Strazzeri, Esq., and James Reopelle

We are living at a time when extraordinary estate and wealth strategies planning advisors are needed like never before. As a result, the public is searching for answers on how to preserve and protect what they have; and for answers on how to thrive into the future. This course is a dialogue on professional collaboration and the type of practice your referral sources and clients experience- your practice as seen through the eyes of others. It introduces you to techniques in which you and your team may use to gain the skills and quiet confidence to position your practice in the forefront of your community and how you can become a "referable" resource to others. Your practice is like no other and should be unique to you.

RSVP to:

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