Thursday Insights for September 2008
2:30 p.m. – 4:00 p.m.

Thursday, September 4, 2008: **7 Steps to a Successful Business Exit**
with Gregory Banner, CFP, CLU, and Alejandro Matuk, Esq.

Every business owner needs to plan with the end in mind as to how they are going to transition out of their business. Exit planning is a customized process of setting goals and deciding how to best achieve them. Proper exit planning will help maximize a business owner's return and minimize the tax liability when the business is transferred or sold.

Thursday, September 11, 2008**:** **Leveraging the IRA**
with Ronald R. Ceniceroz, Financial Planner

This workshop will show you how to leverage client IRA accounts for increased benefits to both the owner and for beneficiaries. Topics will include: Tax Bracket Maximization on Withdrawals and leveraging the account through the use of Roth Conversions, Life Insurance and Charitable Planning.

Thursday, September 18, 2008: **Pre-Empted Due to the SCI Laureate Instructor Training**

Thursday, September 25, 2008: **Trustee Training: The Rights & Responsibilities**
with Rodney J. Hatley, Esq., and Christina M. Labriel, Paralegal

A client or a client's family member has just passed away and now the successor trustee must serve as trustee of the living trust. Are you prepared to handle the myriad of questions that successor trustees will have regarding their rights and responsibilities? Are you aware that tax and investment advice may be different in these situations? To help avoid personal liability, a trustee must seek professional financial, accounting and legal advice. This course is an overview of the legal and procedural requirements of trust administration to assist trustees and their advisors to properly discharge their duties. It addresses the need for legal, tax, accounting, and complete investment planning in trust administration.

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