

Thursday Insights for January 2020 2:30 p.m. – 4:00 p.m.

January 2, 2020 – Pre-empted for the New Year



January 9, 2020 – Trustee Training – Rights and Responsibilities; *Presented by Steve Mancini, Esq. and Richard Katzman, Esq.*

A loved one has just passed away and now the successor trustee must serve as trustee of the living trust. Are they prepared to handle the myriad of questions regarding their rights and responsibilities, taxes, and investments in these different situations? Join Steve and Richard for an overview of the legal and procedural requirements of trust administration to assist trustees and their advisors to properly discharge their duties and avoid personal liability while preserving the important family relationships. The discussion is also the perfect opportunity to review the terms of your trust for this inevitability.

January 16, 2020 – The Defense Contractor’s Dilemma; *Presented by Joe Strazzeri, Esq. and Melisa Silverman, JD, CEPA, CVA, SBA, CMEA*

You are introduced to a new client who is debating exit planning – “this has been a great cash flow year and I can sell for a lot, but will it be enough?” Join Joe and Melisa as they discuss the financial planning “wealth gap,” methods to keep and/or increase the value of the company, opportunities to go to market, and ways to drastically reduce the sale taxation to solve for the wealth gap. This actual TFG 2019 case will also include the collaborative advisor debacle as the client shops multiple advisors and the resulting positive outcome.



January 23, 2020 – The Importance of Personal Brand; *Presented by Shelley Lightfoot, CEPA and Dean DeLisle*

If you’ve received a referral for new business, your online digital presence and branding are critical. You are literally only ONE click away from being either chosen or passed up for great opportunities, but many times, you’ll never know. Equip yourself with the tools and knowledge from the best, who have helped thousands of professionals elevate their personal brands and increase their digital influence. DeLisle, the founder and CEO of Social Jack™, and his team have put together a quick, easy-to-follow recipe to get you on the right track. Join Dean and Shelley as they help you enhance your online personal brand and build your Influence so that YOU are chosen for better (and more) professional opportunities in the new year.

January 30, 2020 – Pre-empted for the Accelerate Program



Taught by award-winning thought leaders, Julie Keyes, CEPA, Founder of KeyeStrategies, Chris Snider, CEPA, CEO of the Exit Planning Institute, and Joe Strazzeri, CEPA, Co-founder of the Southern California Institute and The Founders Group. Designed to grow your practice, build influence, and enhance exit planning win rate.