

# CE INVITATION

## The Basic Course on Estate Planning

*Earn three hours of Continuing Education credits*

presented by:

**Conrad Gangone**

**Date: Tuesday, May 5<sup>th</sup>**

**Time:** 9:00 a.m. to 12:00 p.m.

**Location:** FHFG 95-25 Queens Blvd, 10th Fl, Rego Park, NY 11374

**Date: Wednesday, May 6<sup>th</sup>**

**Time:** 9:00 a.m. to 12:00 p.m.

**Location:** FHFG 1461 Lakeland Avenue, Ste 12, Bohemia, NY 11716

**Date: Thursday, May 7<sup>th</sup>**

**Time:** 9:00 a.m. to 12:00 p.m.

**Location:** FHFG 122 East 42<sup>th</sup> Street, Ste 2200, New York, NY 10168

*Please arrive by 8:45 a.m. course starts promptly at 9:00 a.m.*

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### ***Purpose:***

The purpose of this seminar is to educate financial service professionals in the basic concepts of estate planning. We will explain how to use life insurance and other planning vehicles to accomplish the estate owner's objectives. We will discuss the importance of ownership and the orderly transfer of property. We will define the role of the financial services professional and the coordination of the estate planner, tax advisor and attorney. We will discuss the fundamental mission of a successful practice: to facilitate the estate owner's understanding of

his present situation in order to establish objectives and to present viable recommendations

***This course will cover:***

- Estate Tax Laws history.
- The Federal Estate transfer tax system
- Federal Estate and Gift Tax
- Deduction Allowed from the Estate
- Wills
- Trust
- Estate Planning Techniques
- Providing Liquidity with Life Insurance
- Case studies

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***To Reserve your seat or for more information contact either:***

**Outtara Ly**

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