

Comprehensive Planning for the Individual ©

Objective: Many groups offer separate courses on asset protection, income tax planning, estate planning, financial planning, retirement planning, and investment planning. This course is different because it will address all of them together. The instructor will explain how planning in each area should be integrated. This course will focus on how individuals and business owners should structure their affairs to minimize taxes, while achieving their goals.

What you will learn:

- How to develop a comprehensive plan
- Common estate planning mistakes and how to avoid them
- The advantages and disadvantages of various types of insurance
- How to effectively transfer assets in a tax advantaged manner
- The advantages, and disadvantages, of using a family limited partnership or LLC
- How to provide for the education of your children, in a tax advantaged manner
- How to effectively contribute to charities, while minimizing taxes
- Factors to consider in planning for retirement
- Common investment mistakes people make with their retirement accounts
- How to effectively shift income to others
- How to legally protect assets from creditor claims
- Pitfalls to avoid

CPE: 8 hours

Level: Basic

Category: Taxation/Technical Consulting

Prerequisites: None