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Tax Talk with Larry

Product not yet rated Contains 3 Component(s) Includes a Live Web Event on 10/21/2022 at 2:00 PM (MDT)

DESCRIPTION SPEAKERS

Larry Pon wants to continue the tax conversation with you!

REGISTER

MORE INFORMATION

CCL Boost™ for New Leaders: An Impact Session

Product not yet rated Contains 2 Component(s) Includes a Live Web Event on 09/14/2022 at 10:00 AM (MDT)

DESCRIPTION SPEAKERS SPONSORED BY

Join CCL and FPA to discuss Boost™ For New Leaders, a self-paced online leadership program that equips new leaders with the leadership skills, confidence, and support they need make a successful transition to a leadership or management role.

REGISTER

MORE INFORMATION

Asian-American/Pacific Islanders Knowledge Circle: Legal and Compliance Hot Topics for Investment Advisers

Product not yet rated Contains 3 Component(s) Includes a Live Web Event on 08/25/2022 at 1:00 PM (MDT)

DESCRIPTION SPEAKERS

In this session, we will provide an update on various issues that the SEC and other regulators are focusing on when it comes to investment advisory/financial planning firms.

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MORE INFORMATION

The Advisor Fintech Landscape

Product not yet rated Contains 3 Component(s) Includes a Live Web Event on 08/24/2022 at 12:00 PM (MDT)

DESCRIPTION LEARNING OUTCOMES SPEAKERS

A new report, based on a survey completed by 4,495 financial advisors and planners, shows the total market share and average user ratings for more than 500 tech solutions in 39 different categories. Join co-author Bob Veres as he discusses the data from the T3/Inside Information Software Survey, some of the surprises, and the direction that the tech marketplace is evolving.

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MORE INFORMATION

Women & Finance Knowledge Circle: Corner Office Choices - How Financial Planners Can Help Women Executives Navigate Their Four Financial Derailers

Product not yet rated Contains 3 Component(s) Includes a Live Web Event on 08/11/2022 at 12:00 PM (MDT)

DESCRIPTION LEARNING OUTCOMES

Women executives confront unique issues around money that impact how their financial security may evolve.

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MORE INFORMATION

Business Success Knowledge Circle: Create Operational Peace Of Mind With These 3 Practice Management Tips!

Product not yet rated Contains 3 Component(s) Includes a Live Web Event on 08/09/2022 at 1:00 PM (MDT)

DESCRIPTION KEY TAKEAWAYS SPEAKERS

Firms at all stages of business can benefit from utilizing processes to systematize how they do business, but knowing where to start can be overwhelming

REGISTER MORE INFORMATION

African American Knowledge Circle: Discussion on ESG Investing

Product not yet rated Contains 3 Component(s) Includes a Live Web Event on 08/04/2022 at 12:00 PM (MDT)

DESCRIPTION SPEAKERS

Please join the African American Knowledge Circle on Thursday August 4th at 2 pm ET for a discussion on ESG investing.

REGISTER MORE INFORMATION

July FPA DEI Learning Series: Bridging the Gap of Intergenerational Communication

Product not yet rated Contains 3 Component(s) Includes Credits Includes a Live Web Event on 07/28/2022 at 1:00 PM (MDT)

DESCRIPTION LEARNING OUTCOMES SPEAKERS SPONSORED BY

In this session, we'll discuss the challenge and opportunity as multiple generations work alongside each other.

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The Essential Elements of a Life Plan

Product not yet rated Contains 3 Component(s) Includes Credits Includes a Live Web Event on 07/28/2022 at 12:00 PM (MDT)

DESCRIPTION LEARNING OUTCOMES SPEAKERS

Plotting a rewarding lifestyle is key to independence, security and longevity. The requirements extend beyond finances and investments and embrace good health, affordable housing and accessible location, social engagement and connections, spiritual soundness, strong support network, fulfilling life purpose, enough money, and legal matters. While the most direct routes are tougher for people to forecast, the risk can pay off. The easiest ones—those without much preparation — adds crisis and stress which compromise a pre-retiree's future. Equip clients to prepare more comprehensively and navigate more nimbly to and through their retirement—they'll thrive and gain opportunities to age well.

REGISTER MORE INFORMATION



International & Cross-Border Planning Knowledge Circle: Legal Estate Planning for International Clients living in the US

Product not yet rated Contains 3 Component(s)

DESCRIPTION SPEAKERS

Join us for the July International & Cross-Border Planning Knowledge Circle where we will have Matthew Berlin, Attorney at Rubin and Rudman LLP in Boston, MA.

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