eMoney

LIVE TRAINING

Comprehensive Planning Workshop: Session C

In this interactive workshop, we will review a fictitious client and spouse's financial situation and create a comprehensive estate plan to help the client achieve their lifetime financial goals. We will focus on primarily legacy planning topics, including estate planning, charitable planning, and trust planning.

Comprehensive Planning

9:00 a.m. – 12:30 p.m.

Topics

- Introduction to Client Case Study
- Charitable Planning
- Trust Planning
- Estate Planning

Recommended Prerequisites

- Complete Getting Started Program, Core Concepts Series, and Intermediate Series, & Advanced Series courses
- Attend Platform Essentials, Planning Fundamentals Parts I & II Workshops
- Complete Case Studies found in the Training Tab

Next Steps

- Visit eMoney's Training Tab for additional training resources.
- Listen to available webinars in our Advanced Series and Impactful Extras for continued learning.
- The course qualifies for 4 CFP® Continuing Education Credits.

Please Note: This session does NOT include Foundational Planning.

https://emoneyadvisor.com training@emoneyadvisor.com 1.888.362.8482