

CPE LUNCHEON: NOVEMBER 17

Make plans to attend our CPE luncheon on **Friday, November 17 at the Ortiz Center. Registration opens at 11:30 a.m. and the program will begin at 12:00 p.m.**

TITLE: Clients' Motivations for Estate Planning

SPEAKER: Thomas W. Cullinan, JD, Thompson & Associates

DESCRIPTION: Because many clients considering estate planning are relatively affluent — perhaps even prominent in the community — CPAs, attorneys, and financial professionals may assume they are getting the best possible advice from an array of advisors. That can be a dangerous assumption if the other advisors are primarily technicians who do only what is narrowly required within the relationship. This presentation will explore what advisors should not do when approaching their clients, and how best to meet them where they are regarding personal choices and decisions. We'll look at factors relating to those who contribute to hospitals and healthcare charities based on groundbreaking research about affluent individuals and their motivations. Participants will also acquire tips for starting these conversations with their clients.

DESIGNED FOR: CPAs and other accounting professionals

CPE HOURS: 1 **PREREQUISITE:** None **COURSE LEVEL:** Basic

WHEN: Friday, November 17, 2017; Registration at 11:30 a.m., Program from Noon to 1:00 p.m.

WHERE: Ortiz Center, 402 Harbor Drive, Corpus Christi

COST: \$35 if registered by Friday, November 10; \$40 registrations received after November 10.

WALK-INS WILL BE PERMITTED UPON AVAILABILITY ONLY.

We do not have change at the door. Please prepay or pay by check at the door.

Please send one form and list all names of those attending.

Program ID: CCZ1117

Name(s): _____

Firm/Company: _____

Phone: _____ Email: _____

Payment Method: MasterCard Visa American Express Check (enclosed or pay at door)

Credit Card Number: _____ Expiration Date: _____

Name as it appears on card: _____ Charge Amount: _____

Please mail payment to: Corpus Christi Chapter/TSCPA, 14651 Dallas Pkwy, Suite 700, Dallas, TX 75254. Registrations may also be emailed to mbentley@tscpa.net or faxed to 972/687-8679. Phone reservations may be made by calling 1-800-428-0272, ext. 279.

**CANCELLATIONS MUST BE RECEIVED BY NOON Friday, November 10, 2017.
REFUNDS ARE NOT ISSUED AFTER THE CANCELLATION DEADLINE. NO SHOWS WILL BE INVOICED.**

_____ ADA Special Services - I will require special accommodations to fully participate. (Please attach description.)