

CE EVENT
WEDNESDAY, JUNE 21, 2017
7:45 AM to 12:30 PM



**ADVANCED GIFTING TECHNIQUES WITH
IRREVOCABLE LIFE INSURANCE TRUSTS**

8:15AM-10:15AM: Earn 2 CE Credit Hours - NJ Life & Health and/or CFP

This course is intended to provide an in depth study of gifting issues and potential solutions when funding irrevocable life insurance trusts. The rules and limits will be discussed in detail together with the gifting strategies that are used and what facts make them effective or not effective. A case study will be presented illustrating the concepts discussed. At the end of the course you should be able to identify the gifting issues in funding an irrevocable life insurance trust and potential solutions to such issues.

Presented by: Brian Singleton, JD, CLU®, ChFC®
Advanced Markets Director

**CREATING LIFETIME RETIREMENT
INCOME**

10:30AM-12:30PM: Earn 2 CE Credit Hours - NJ Life & Health and/or CFP

This course will educate attendees on ways of producing predictable income for the quickly growing wave of retirees and pre-retirees. With the use of case studies, attendees will see alternative measures that may work for their clients. The 4-Box Strategy for Retirement Income, introduces a proven approach of managing income from assets.

Presented by: Bruce Bickar, RICP®
Agency Supervisory Officer

Hosted By:

MassMutual Tri State



TRI STATE

RSVP BY:

June 12, 2017

Phone:

732-623-5541

Email:

sscaperrotta@financialguide.com

Date: Wed., June 21, 2017

Time: 7:45 AM - 12:30 PM

Location: MassMutual Tri State

186 Wood Ave. S, Lower Level

Iselin, NJ 08830

INCLUDES:

Continental Breakfast

7:45 AM-8:15 AM

**CALL OR EMAIL
TO RESERVE YOUR
SEAT TODAY!**



TRI STATE

186 Wood Avenue South, Ste. 301

Iselin, NJ 08830

Phone: 732-623-5541

Website: tristate.massmutual.com