# CE EVENT WEDNESDAY, JUNE 21, 2017 7:45 AM to12:30 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<sup>®</sup>, ChFC<sup>®</sup> 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<sup>®</sup> Agency Supervisory Officer Hosted By:

MassMutual 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!



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