

CE EVENT
WEDNESDAY, NOV. 15, 2017
8:00 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®
Chief Operations Officer

Hosted By:

MassMutual Tri State
MassMutual
Tri State

RSVP BY:

November 10, 2017

Phone:

856-231-2632

Email:

JenniferMcGuigan@financialguide.com

Date:

Wednesday, Nov. 15, 2017

Time:

8:00 AM - 12:30 PM

Location:

MassMutual Tri State
61 S. Paramus Rd, 5th Floor
Paramus, NJ 07652

INCLUDES:

Continental Breakfast
8:00 AM - 8:15 AM

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

MassMutual
Tri State

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Paramus, NJ 07652
856-231-2632
www.tristate.massmutual.com