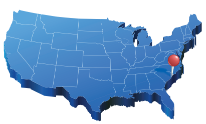
CANNON FINANCIAL INSTITUTE

COURSES



LOCATIONS

Myrtle Beach, SC

REGISTER

COURSES

FINANCIAL ADVISOR'S COURSE ON TRUSTS (FACTs)

Curriculum

Understanding Client Objectives
Titling of Property
Income Taxation of Trusts Overview
Gift, Estate and Generation Skipping Transfer Tax Overview
Powers of Attorney, Wills, and Revocable Trusts
Estate and Trust Transfer Process
Irrevocable Trusts, Types and Uses

- Credit Shelter Trust
- Marital Trust
  - Power of Appointment
  - QTIP
  - QDoT
- Charitable Remainder Trust
- Charitable Lead Trust
- Grantor Retained Annuity Trust
- Qualified Personal Residence Trust
- Life Insurance Trust
- DynastyTrust
- Intentionally Defective Grantor Trust
- Special Needs Trust

Charitable Giving Methods
Family Limited Partnerships
Coordinating Retirement Plan with Estate Plan
Investment Strategies by Type of Trust
Other Commonly Used Planning Techniques

This course is for professionals who deliver financial information and advice to wealthy clients and families. FACTs provides an in depth understanding of the planning strategies utilized and vehicles employed to effectively manage and transfer wealth with optimal control and minimal tax consequences.

The 2 day program delivers the information necessary to develop conversational competence and a clear understanding of why each technique is used, what the variables are, and how to combine various methods for greatest effect.

FACTs aids greatly in the sale and advice giving process, from common to highly sophisticated techniques.

FACTs is designed for creating understanding for the person who deals with, yet does not necessarily administer these arrangements. For administration, consider Personal Trust Fundamentals and Cannon Trust School. FACTs supports the sales process by providing expertise, yet for integration with a business plan consider Growing Your Business, Private Wealth Sales, and Wealth Management for Private Bankers.

Who Should Attend

- Financial Advisors
- Financial Consultants
- Private Bankers
- Family Offices
- Attorneys & Paralegals
- Accountants
- Financial Planners
- Portfolio Managers
- Investment Advisors
- Business Development Officers
- Wealth Advisors
- Charitable Advisors
- Brokers
- Insurance Professionals
- Managers of Wealth Professionals
- Professional Fiduciaries

Key Benefits

- Participants will gain a clear understanding of the wide variety of estate planning techniques available to the wealthy client and the benefits of each
- Participants will cover the information needed to achieve conversational competence in both common and complex estate planning strategies
- Participants will be able to immediately use the knowledge gained to sell more effectively and communicate more clearly with clients and prospects
- Participants will return with valuable resource materials that can used daily to support their information sharing and advice giving

Class Schedule

Registration and orientation take place on Sunday afternoon and classes begin on Monday at 8:00 AM. Classes end on Wednesday at noon. Attendance is mandatory at all sessions.

Faculty

Daniel A. Smith
Executive Vice President and
Director of Personal Trust Services
Cannon Financial Institute
St. Augustine, FL