

Take Your Development to the Next Level

Special Needs School

LOCATION

Chicago, IL
August 27-28, 2012

FACULTY

Fran M. DeMaris
Executive Vice
President
Cannon Financial
Institute

Overview

Cannon has fifty years of practical financial and trust training experience which enables us to offer the Special Needs School, training advisors to educate and guide Special Needs families through the planning process, ultimately providing them with peace of mind.

Cost: \$1450

REGISTER NOW

Curriculum

- Planning and Creating A Special Needs Trust
- Key Points of the Special Needs Trust
- Adding the Special Needs Trust to a Will or Living Trust
- Alternatives to a Special Needs Trust
- Identifying Resources to Fund the Plan
- Special Needs Trust Administration
- Understanding Resources, Benefits, and Government Entitlements
- Guardianship & Conservatorship
- Medical Expenses
- Transportation
- IEPs (Individual Education Plans)

Who Should Attend

- Financial Planners & Consultants
- Financial Advisors
- Wealth Management Advisors
- Personal Trust Administrative Officers
- Trust Business Development Officers
- Personal Trust Managers
- Trust Audit/Compliance Officers
- Professional Fiduciaries
- Attorneys and Paralegals
- Accountants
- Insurance Professionals
- Estate Planners
- Life Planners

Key Benefits

Participants return to their institutions with practical information and skills immediately applicable to help advise the special needs community

Participants acquire a solid foundation in special needs planning

Participants become part of a network with other students and members that will benefit them for years to come