The Cannon Estate Planning Teleconference Series is:

**All-inclusive**
The entire event is prepared for you; marketing collateral, all client resource materials and pre-authorized Certificates of Attendance. As a bonus, you receive the support of Cannon sales and service staff to ensure a stellar program.

**Beneficial**
You and your business partners keep current with today's Estate Planning legalities as well as meet Continuing Learning and Education requirements.

**Convenient**
Calls occur monthly as a live broadcast within all time zones; you and your colleagues can host lunch prior, during, or after the program.

How do I get started?
Register through our website at www.cannonfinancial.com/teleconference or call our staff at 706.353.3346.

What will I pay?
Cost of one phone line and set of reproducible materials begins at $295 per month and decreases based on the number of purchases.

Who can I talk to for more information?
To discuss ways to market your program, reduce your cost, and ensure your success, please call 706.353.3346, and ask for a Teleconference Client Advisor.

Our Continuing Education Specialist, Laurie Frye, is available to answer any questions of eligibility and appropriate credit breakdown. You can reach Laurie at 706.389.7645 or lfrye@cannonfinancial.com.

For more information please visit:
www.cannonfinancial.com/teleconference

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For information regarding learning objectives, program level, amount of recommended CPE credits, or our refund/cancellation and complaint resolution policy, please visit www.cpemarket.com.
Standing to Sue Trustees
Taking Advantage of the Increased Applicable Exclusion Amount, Including the Benefits of Portability
The Importance of Life Expectancy in Determining the Appropriate Transaction
Achieving Basis Step-Up Through Powers of Appointment
Issues Addressed by the Uniform Powers of Appointment Act
Liability Risks for the Agent
Design of New Estate Planning Documents, Including Provisions to Comply With the Dissolution Decree
Designing Powers of Attorney to Help Prevent Financial Elder Abuse
Repositioning and Retitling of Assets
Planning for Possible (or Certain) Remarriage
Representing Disabled Clients
Analysis of the Benefit of a Grantor’s Paying the Income Tax Incurred by a Grantor Trust
Exculpatory Clauses and Other Limitations on Liability
Educating Clients and Prospective Clients on the Importance of Sophisticated Estate Planning and Trust Services
Loans to Beneficiaries
Asset Protection for Retirement Assets
Taxation and Distribution Rules for IRAs and Qualified Plans
Balancing Investment Performance With Beneficiaries’ Needs
The Ability of a Beneficiary to Sue a Third Party Who Transacts Business with a Trust
Claims Against Directed Trustees
Avoiding Ambiguity and Disputes in Drafting Language Conferring and Exercising Powers of Appointment
Representing Members of the Same Family
Administration of Digital Assets
Asset Protection Planning
Nonprofit Board Service
Asset Protection With Third Party Trusts
Administration of Trusts for Beneficiaries Dealing with Addiction
Utilizing Changes in the Law as Marketing Opportunities
Prospective clients often have misunderstandings about estate planning and trust administration services. Among the third parties is optimized. The following critical issues will be discussed during this teleconference:
• Determining Appropriate Powers to Grant to an Agent
• Designing Powers of Attorney to Help Prevent Financial Elder Abuse
• Liability Risks for the Agent
• Third Parties Dealing With the Agent
• Developing and Keeping Business for Estate Planning and Trust Professionals
Prospective clients often have misunderstandings about estate planning and trust administration services. Among the most common are that their wealth and family dynamics warrant only a “simple” estate plan and that the services of knowledgeable, focused estate planning and trust administration professionals are not necessary. These myths lead a prospective client to engage partners lacking necessary experience or to create a do-it-yourself estate plan with inappropriate dispositions and fiduciary appointment provisions. In a marketing services, the following best practices are addressed in this teleconference should be considered:
• Educating Clients and Prospective Clients on the Importance of Sophisticated Estate Planning and Trust Services and the Breadth of Services Offered
• Alternative Fee Arrangements
• Utilizing Changes in the Law for Marketing Opportunities
• Periodic Reviews or Follow-Ups with Clients Concerning Trust Administration and Updating Estate Plan