Learning in Retirement, University of Wisconsin-Green Bay

Rose Hall: Room 230

Estate and Financial Planning Issues for Retirees

Coordinator: Bob Fischer: Mar 29th thru May 3rd

The Estate Planning Council of NE. Wisconsin has prepared 10 one hour classes

Mar 29th 1-3 PM	1st hour Session One	instructor
	Durable POA/ Healthcare POA Authorization for Final Disposition	Brian Mudd JD CPA
	2nd hour Wills and Revocable Living Trusts Wisconsin Marital Property Law	Evan Lin JD CPA
Apr 12 1-3 PM	1st hour Session Two	
	Review of Life insurance, annuities, Medicare Plans Partnership LTC policies	Wm.Van Ess CLU ChFC Leigh Pickl
	2nd hour Session Two IRA's and RMD's Roth Conversion opportunities in 2010	Robert Keebler CPA MST AEP
Apr 19th	1st hr Session Three Wisconsin Medicaid programs Spousal impoverishment rules and applications	Daniel Walsh JD CPA
	2nd hr Session Three Defining Long Term Care Risks Solutions to the long term care problem	Robert Fischer CLU ChFC AEP

Apr. 26th	1st hour Session Four	
1-3 PM	Understanding types of trusts	Mary Eckert CTFA
	Estate Planning Strategies with Trusts	
	2nd hour Session Four	
	Understanding Federal Gift and Estate Taxes	Jay Kramer MST CPA
	State and Property Taxation differences	Bill Evenson JD CPA
	Income Tax and Estate Tax reduction Strategies in 2010	
May 3rd	1st hour Session Five	
	Suitability of investments for retirees	Gene Olson CFP
1-3 PM	Alternative income and equity investments	Tom Wiers CLU ChFC
	2nd hour Session Five	
	Understanding alphabet soup	Frank Cape MSFS CFP ChFC CLU
	Criteria for selecting an advisor	

For more information contact Learning in Retirement at 465-2356 or by email: lir@uwgb.edu
LIR website: www.uwgb.edu/outreach/LIR