



Asset Protection Planning

PLACE:

DATE:

TIME:

Schedule of Additional Offerings

1. Social Security Planning: What CPAs' Need to Know About Claiming Strategies
2. Business Succession Planning- Formalizing the Transfer of Ownership
3. Charitable Giving - Philanthropic Planning Tools
4. Social Security Claiming Strategies
5. Business Valuation
6. Selective Executive Compensation Strategies
7. Consulting Services that Clients Want From CPAs
8. Planning Chronic Illness & Long Term Care Expenses
9. Retirement Income Strategies
10. Selective and Discriminatory Executive Retirement Strategies (SERP)

Learning Objectives

CPAs will learn unique legal strategies used to help clients proactively protect and shield their personal, business and investment assets from a variety of threats, which can come from creditors, predators and litigants.

LIVE INSTRUCTION

Prerequisites: None

Program Level: Basic though Advanced

Advanced Preparation: None

SEATING IS LIMITED

RSVP to: Ray Croff

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We have registered with the Texas State Board of Public Accountancy as a CPE Sponsor. This registration does not constitute an endorsement by the Board as to the quality of our CPE program.

Protect Assets, Grow Wealth, Live Well



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