



Consulting Services that Clients Want From CPAs

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. Asset Protection Planning
6. Selective Executive Compensation
Strategies
7. Planning Chronic Illness & Long
Term Care Expenses
8. Retirement Income Strategies
9. Business Valuation
10. Selective and Discriminatory
Executive Retirement Strategies
(SERP)

Learning Objectives

- How to attract more clients and make more money
- How to benefit from your client's inevitable exit
- How to control the relationship without over-extending

Your clients will leave their businesses, voluntarily or involuntarily. That's a fact. They are looking to you to help them make the right decisions and to support them throughout the process - and it is a process. Our discussion will focus on how you can compete with the larger firms to provide consulting services to current and prospective clients without over-extending your financial and staff resources.

LIVE INSTRUCTION

Prerequisites: None

Program Level: Basic though Advanced

Advanced Preparation: None

SEATING IS LIMITED

RSVP to: Ray Croff

croff@raycroff.com

940-391-5336

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



Ray Croff, CLU, ChFC, RFC, CAP
Registered Financial Consultant • Managing Partner
Cell Direct: 940.391.5336 • croff@turtlecreekfinancial.com

