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A FREE LIVE WEBCAST EVENT



Exclusively for
Estate Planning Attorneys and Financial Planners

The Best Ideas & Strategies to Motivate Clients to Plan

Webcast powered by: **ON24**

Wednesday, April 29, 2009 • 1:00 - 2:00 p.m. Eastern Time

Space is Limited! Register at www.WealthCounsel.com/Webcast.aspx

Economic volatility presents unique challenges as well as opportunities for estate planning professionals.

- Are your clients hesitant to plan during turbulent market conditions?
- Are your referral sources struggling to convince clients of the need for an estate plan?

In this webcast, you will learn why it is important to stay relevant to client's needs during an uncertain economy, and how doing so will result in a profitable practice with sustainable value.

Our panel of experts will discuss ~

- How comprehensive financial planning aids in client acquisition during turbulent times.
- How to add value to current client relationships in a negative investment return environment.
- How to optimize your clients' tax avoidance strategies through Roth conversions, suspended 2009 RMDs, GRATs and IDGTs.
- How to reduce client anxieties with self-settled trusts and defined value formula transfers.

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