WealthCounsel 2006 Curriculum Registration Form

PAY AS YOU GO TUITION

MEMBERS: $240 per course credit **NON-MEMBERS: $695 per 2-day course *OR* $995 per 3-day course**

PREPAID CREDITS **Purchase 10 or more credits at only $220 per credit.**

☐ **PURCHASE PREPAID CREDITS** ***(CAN BE USED ANYTIME WITHIN 12 MOS.)*** **# OF CREDITS __________**

(ALL* FIELDS REQUIRED)

* NAME OF REGISTRANT MEMBER Y ☐ N ☐	* COURSE SELECTION(S)	NICKNAME FOR BADGE
* NAME OF REGISTRANT MEMBER Y ☐ N ☐	* COURSE SELECTION(S)	NICKNAME FOR BADGE

BILLING ADDRESS: ***(ALL * FIELDS REQUIRED FOR CREDIT CARD BILLING)***

* FIRM NAME ______________________________ * PHONE ______________

* ADDRESS ____

CITY, STATE ______________________________ * ZIP ______________

(NEEDED FOR NAME BADGE) *(FROM **BILLING ADDRESS)***

EMAIL ADDRESS(S) ____

NOTES: ____

☐ ***PAY WITH PRE-PAID EDUCATION CREDITS*** Total credits to be deducted from account __________

☐ ***CHECK ENCLOSED***

OR: **I AUTHORIZE WEALTHCOUNSEL TO CHARGE MY CREDIT CARD** **TOTAL $ __________**

☐ MasterCard ☐ VISA ☐ AMEX ☐ Discover

* Card Number ______________________________ * Expiration Date ______________

* Signature ______________________________ Date ______________

CANCELLATION POLICY

Any enrollee in a WealthCounsel course that cancels at least 10 business days in advance of the start of the course will be eligible for a full refund. For all cancellations within 10 business days of the start of a course, the full tuition will be applied towards education credits or towards the cost of WealthCounsel membership.

CONTINUING EDUCATION

WealthCounsel LLC is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Nashville, TN, 37219-2417. Web site: www.nasba.org.

For a full listing of all WealthCounsel approved courses, go to http://www.wealthcounsel.com/clecredits.aspx. Please include your state bar number(s) and/or CPA number for our records and to help ensure availability of proper forms.

______________________________ / ______________________________

STATE(S) AND BAR NUMBER(S) CPA CERTIFICATE NUMBER

Please fax to (888) 292-6126 or call (888) 659-4069 ext 823

Or mail to WealthCounsel, LLC, PO Box 44403, Madison, WI 53744-4403

E-mail: registration@wealthcounsel.com or visit us at www.wealthcounsel.com

REVISED 7-06-2006

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For information email registration@wealthcounsel.com or call (888) 659-4069 ext 823

Education Pricing - **NOTE: CREDITS CANNOT BE USED FOR* Practice with Purpose™ or BEI
Take advantage of WealthCounsel's many educational offerings at a discount by purchasing Prepaid Education Credits. Members who pay as they attend will pay $240 per course credit (higher for non-members)—each credit being equivalent to one day's enrollment in a course. With prepaid credits, "Education Members" need only register for any WealthCounsel education event and attend . . . tuition is already paid at a discount (see table on first page). Prepaid credits may also be used to purchase course materials. Credits can be used for up to one year from date of purchase and are available to all firm members, associates, and their staff. ***Take advantage of the reduced tuition rates by purchasing credits for your firm today.***

PLEASE VISIT OUR WEB SITE FOR DETAILS ON LOCATIONS, HOTELS & AGENDAS

http://www.wealthcounsel.com/calendar2006.aspx

January—Miami, FL Jan 13 - Putting Heckerling into Practice
February—Los Angeles, CA Feb 6-8 - WealthDocs Training (3 Credits)
March—Orlando, FL
Mar 6-10 Overview of Estate Planning Concepts,
Practice Building, and Your WealthCounsel Membership (5 Credits)
Mar 7-8 Domestic and Offshore Asset Protection Planning (2 Credits)
Mar 9-10 Planning for Physicians (2 Credits)
March—Natick, MA (Boston)
Mar 25 Thriving in Estate Planning (1 Credit)
April —Dallas, TX
Apr 3-5 EP 101: Understanding and Drafting Revocable Trusts,
Ancillary Documents and Irrevocable Life Insurance Trusts (3 Credits)
Apr 6-7 Practice with Purpose Workshop 2
Apr 6-7 EP 102: How to Effectively Present Estate Planning Concepts to Clients (2 Credits)
April —Chicago, IL
Apr 12-14 WealthDocs Training (3 Credits)
May – San Diego, CA
May 1-2 Estate Planning 206: Understanding and Drafting
Special Needs Trusts Presented by Steve Dale (2 Credits)
May 3 New Member Orientation
May 3 Thriving in Estate Planning (1 Credit)
May 4-6 WealthCounsel's 2006 National Conference
May – Columbus, OH
May 20 - Thriving in Estate Planning (1 Credit)
June—New York, NY
June 22 Thriving in Estate Planning (1 Credit)

July—Boston, MA

July 19-21 WealthDocs Training (3 Credits)

August—Chicago, IL

Aug 14-15 Practice with Purpose Workshop 3

Aug 14-18 Overview of Estate Planning Concepts, Practice Building, and Your WealthCounsel Membership (5 Credits)

Aug 15 - Thriving in Estate Planning (1 Credit)

Aug 16-17 EP 203: Understanding and Drafting Irrevocable Trusts (2 Credits)

Aug 18-19 - EP 205: Understanding and Drafting Retirement Plan Beneficiary Designations and Trusts (2 Credits)

September—Washington, DC

Sept. 14-16 WealthDocs Training (3 Credits)

September—Kirkland, WA

Sept 14 Thriving in Estate Planning (1 Credit)

September—Portland, OR

Sept 15 Thriving in Estate Planning (1 Credit)

October —Dallas, TX

Oct 3-4 - Practice with Purpose Team Training (2 Credits)

Oct 5-7 WealthDocs Training (3 Credits)

October —Atlanta, GA

Oct 9-11 EP 101: Understanding and Drafting RLTs, Ancillary Documents and ILITs (3 Credits)

Oct 10-11 Working with Non-Profits (2 Credits)

November—Oakland, CA

Nov 10 Thriving in Estate Planning (1 Credit)

November—Irvine, CA

Nov 11 Thriving in Estate Planning (1 Credit)

December —Las Vegas, NV

Dec 4-5 Practice with Purpose Retreat (3 Credits)

Dec 6-7 BEI Boot Camp*

Dec 6-7 EP 202: Understanding and Drafting FLPS and FLLCs (2 Credits)

Dec 8-9 EP 207: Understanding and Drafting Advanced Succession Planning Documents (2 Credits)

Dec 10 Thriving in Estate Planning (1 Credit)