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CPE Program Notification Form for CPAs seeking credit

Program Title: Death and Giving: Considerations and Insight for Estate Planners

Presentation Date: Thursday, October 25, 2018

Location: Saddle Brook Marriott, Saddle Brook, NJ

Starting Time: 8:00 a.m. **Ending Time:** 12:00 (noon).

Instructor: Stephan R. Leimberg, CEO & Publisher
Leimberg Information Services

Format: Lecture

Program Level: Intermediate

Description of Program: An Estate Planners Guide: The Psychology of Charitable Giving, Death & Dying

Learning Objective: Charitable giving, death & dying are difficult topics to approach with clients. The objective of this course is to provide attendees with different points of view to more comfortably address the topic with their clients.

Requisite Knowledge and Experience: Basic Tax

Topic: Tax, Consulting Services

Advanced Preparation: None

Total CPE hours to be earned: 3.5 credits