Syllabus for Continuing Education Program

Program Provider:	Society of Financial Service Professionals Twin Cities (MN Dept. of Commerce Provider #8724) 4707 Highway 61, Suite 196 White Bear Lake, MN 55110-3227 651.815.0668 admin@sfsptwincities.org Website: www.sfsptwincities.org
Program Coordinator:	Sandy Beeson, Chapter Executive 651.815.0668 sandybeeson@sfsptwincities.org
Program Chair:	Carole Evenchik 651.308.8555 | carole@ecbmm.com
Title:	Tackling the Unexpected: Your Clients' Experience
Speaker:	Cameron Parkhurst JD Sussman+Parkhurst, PLLC Attorneys at Law 2829 University Avenue SE, Suite 745 Minneapolis, MN 55414 612.465.0099 | cameron@sussmanparkhurst.com
Date:	Thursday, February 6, 2020
Time:	11:00 AM Sign-in/Networking 11:15 AM Lunch Buffet open 11:30 AM Business meeting begins 12:00 PM – 2:10 PM Presentation
Location:	**Town & Country Golf Cub** 300 N. Mississippi River Blvd. St. Paul, MN 55104
Attendance Fees:	FSP Members: $40 Nonmembers first-time attendance: $40 Nonmembers repeat attendance: $50 Walk-ins: $10 surcharge over registration fee Refunds: No refunds for cancellations received after 1/31/20
CE Credits:	This educational offering is APPROVED by the Minnesota Commissioner of Commerce as satisfying 2.0 hours of general classroom credit toward continuing insurance education requirements. CFP: 2.0 hours APPROVED standard credits CLE: 2.0 hours APPROVED standard credits A certificate of attendance is available for individuals requesting CPE and PRP (Professional Recertification Program – formerly PACE) credits.

Who Should Attend: Estate planners, financial planners, investment advisors, insurance producers, retirement counselors, CPAs and JDs

Educational Level: Intermediate

Course Description

The purpose of this presentation is to engage with the speaker and your fellow attendees to learn about tackling your clients' unexpected estate planning requests; plus, a discussion about joint trusts.

Learning Objectives

1. Gain an understanding of the tools used in an estate plan
2. Learn about joint trusts
3. Learn that unusual estate planning requests can be solved. For example, . . .
   - Making gifts to thirty-two beneficiaries
   - Ensuring that an ex-spouse never receives any more of your client's assets
   - House or residence trusts to handle real estate in a second marriage situation where there are no common descendants
   - How to parent from the "grave"

Outline

Section 1 – Introduction	5 minutes
Section 2 – Break out #1	5 minutes
Section 3 – Discussion	10 minutes
Section 4 – Relationships	10 minutes
Section 5 – Estate Plans	20 minutes
Section 6 – Break out #2	10 minutes
Section 7 – Joint Trusts	10 minutes
Section 8 – Case Studies	30 minutes
Section 9 – Avoiding Litigation	10 minutes
Section 10 – Key points and conclusion	10 minutes

Total time: 120 Minutes

Instructional Materials for Students:

- None

Examination & Answers:

- No exam

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