Live Web Meeting · June 30th at 10:30 a.m. (CDT)

Guiding Clients in Light of Proposed Tax Legislation

Guest Speaker Steve Parrish

Sponsored by Principal Financial Group

CLICK HERE TO REGISTER

DISCUSSION

Currently proposed federal tax legislation, if enacted, would significantly change the estate planning landscape. Estate planning attorneys are already facing a surge of clients concerned about how the proposed changes could affect their estate plans and, in turn, the tax ramifications their heirs could face. This presentation will provide the most current update on proposed tax legislation along with suggested next steps to ensure your clients estates won't become a casualty of increased taxes.

SPEAKER

Steve Parrish is the Co-Director of the *Center for Retirement Income* at The American College of Financial Services, where he also serves as an Adjunct Professor of Advanced Planning. He is also an Adjunct Professor of Estate Planning at Drake University Law School. With over 40 years' experience as an attorney and financial planner, Parrish frequently addresses the financial challenges of individuals, business owners and executives nationwide.

Steve is an expert on retirement, estate, and business owner succession planning. He is a recognized industry authority, spokesperson and author serving as an ongoing columnist for Forbes.com.

Steve has served as an expert source for such prominent media outlets as InvestmentNews, Money.com, Kiplinger, MarketWatch, Wall Street Journal Radio, USN&WR, HR Magazine, and the Retirement Income Journal. He is also an Associate Editor of the Journal of Financial Services Professionals. In addition, he is a sought-after speaker with bar associations, estate planning councils and state AICPA meetings. He has addressed such financial service organizations as MDRT, AICPA, Finseca, NAIFA, INC 5000, and Society of Financial Service Professionals. Steve also addresses numerous business organizations nationwide and has served as an expert witness.

CONTINUING EDUCATION

This webinar is approved for one hour of CFP, Missouri MCLE, and Missouri Life and Health continuing education credit.

CONTACT

marketing@buiusa.com
(800) 645-2841