Your Hosts

BOB MAUTERSTOCK, CFP
Co-Founder Plan4Life

ANNALEE KRUGER, LBSW
Co-Founder Plan4Life

Thank You to our Sponsors!

AAG Retire Better

Daniel Mudd
Market Sales Manager

Contact Us if you're interested in becoming a Workshop Sponsor!

Baby Boomers

will accumulate 40 trillion dollars by 2050...

Learn the skills to become their trusted advisor.

Become a Certified Elder Planning Specialist!

$795/Attendee
Ask us about multiple corporate attendee discounts!

To Register visit
www.plan4lifenow.com/may2019

Fri: 8:30 - 5:00 Sat: 9:00 - 4:00

Sandler Training/Strategic Solutions
20855 Watertown Rd, Suite 130
Waukesha, WI 53188

PLAN4LIFE

CERTIFIED ELDER PLANNING SPECIALIST WORKSHOP

MAY 17-18, 2019
BROOKFIELD, WI

Bob@plan4lifenow.com
Annalee@plan4lifenow.com

(239) 770-6322

www.plan4lifenow.com

Workshop Goals

DID YOU KNOW THAT:

- More than 10,000 Baby Boomers retire each day?
- More than $40 Trillion will be transferred down to the next generation by 2050?
- More than 90% of children will not hire their parent's Financial Advisor to manage their investments?

Plan4Life's ***Certified Elder Planning Specialist*** curriculum helps advisors understand these changing demographics and dynamics by equipping them to:

- Realize their clients are looking for more "value-added" services & advice
- Understand the aging process and the exorbitant costs of senior care
- Recognize when their clients begin to exhibit diminished capacity
- Create relationships with the client's children & family
- Facilitate difficult conversations regarding end of life desires & options
- Grasp the financial, physical and emotional toll of being a caregiver
- Create trusted network of affiliated professionals

Stand out from the crowd and capture more business! Enroll today to become a Certified Elder Planning Specialist!

Program Sessions

- **The Big Shift: Becoming a Longevity Planner**
- **Understanding the Aging Process**
- **Legal Issues to Consider**
- **Legacy Planning**
- **End of Life Planning**
- **What Every Advisor Needs to Know About Health Care**
- **How to Cover the Costs of Long Term Care**
- **The Caregiver's Role**
- **How to pay for Aging in Place**
- **Facilitating Communication Between Aging Clients & Families**
- **How to Deal with Clients Who Demonstrate Diminished Capacity**
- **Tools to Aid & Grow Your Practice**
- **Creating an Eldercare Team**
- **Summary and Discussion**
- **Certification Exam**

Participants who attend all Program Sessions and score 70% or better on an open book, multiple choice exam will earn the *Certified Elder Planning Specialist* (CEPS) professional designation. Those who currently hold a CFP designation and attend all sessions will also earn 12 CE Credit Hours.

Guest Speakers

In addition to your hosts, the following industry specialists will also be presenting:

Brian Byars - ***VA Benefits***
Founder - Advanced Retirement Planning LLC

Daniel Mudd - ***Reverse Mortgages***
Market Sales Manager- AAG

Don Quante - ***Paying for Long Term Care and Marketing Strategies***
Founder - Million Dollar Advisor

John Sage, JD, CPA, CMA - ***Legal Issues***
Attorney - Schober & Mitchell, SC

Jim Silbernagel, CFP, LUTCF - ***Multi-Generational Communication***
President - The Silbernagel Group