PROFESSIONAL DEVELOPMENT PROGRAMS

- Your choice of topic
- Your chosen audience
- Logistics managed by FSP
- Webinars or on-site programs

High-Quality Educational Programs Delivered Exclusively to Your Private Audience

Use our extensive experience and deep expertise in producing industry-acclaimed professional development offerings to provide leading-edge information about issues of importance to your invited attendees.

Whether webinar or live event, FSP will handle all the logistics, provide the speaker (with your input), conduct the live event on a mutually agreed upon day and time, and make the archived program available to you for your unlimited use. We are an approved CE provider for insurance, legal (CLE), accounting (CPE), CFP, banking (ICB), and Enrolled Agents.

Having produced hundreds of educational programs, we are qualified to address the topic of your choosing, or can suggest these areas of interest:

- Social Security
- Split-Funded Life Insurance
- DOL Fiduciary Rule
- Planning for Pass-through Business Entities
- Maximizing Charitable Gifting
- Use of Insurance Products in Required Minimum Distribution Planning
- Pros and Cons of Reverse Mortgages (Home Equity Conversion Mortgages)
- Special Needs Planning
- Liquidity Strategies for Business Owners
- Planning for Cost of Health Care in Retirement
- Code Section 101(j) in Business Planning
- Fact Finding and Opportunities from Your Client’s Tax Return
- Protecting Your Practice – Current Errors and Omissions Trends and Loss Prevention Tips
- Disability Insurance in Business Planning
- Implications of Dealing with Diminished Capacity
- How Business Valuation Can Improve Financial Planning and Prospecting
- Case Studies in Life Insurance as an Asset Class
- Building a Practice with a Focus on Income Distribution
- Retirement Distribution Planning
- Living Benefit Riders in Variable Annuities