



Gary's In-house Financial Planning Training for CPA's who are not Financial Planners

Who is this training for?

- (a) CPA's of any age who have not had a formal training in financial planning
- (b) CPA's who want to be more competent at helping family, friends, relatives and co-workers who have questions and concerns about their financial situation
- (c) CPA's who are early on in their career and need to put a solid financial plan in place
- (d) CPA's interested in becoming part of the AICPA's financial literacy movement
- (e) the accounting firm's support staff who need to get more out of what they make.

What you'll learn:

- (a) the five critical tools, the five critical steps and the ten simple steps related to financial planning
- (b) the critical advisors you'll need throughout your life and the questions to ask when working with them
- (c) the most common financial planning pitfalls and how you and your family can avoid them whether you are struggling to save, trying to invest or planning for retirement
- (d) how to maximize the return on your investments and 401(k)
- (d) the critical estate planning steps required to plan for a comfortable retirement
- (e) how the psychology of money management affects financial planning decisions...and much, much more.

What you'll get:

- (a) CPE Credits: Earn up to 8 Credits with full attendance. Field of Study Subject Area is six (6) credits for Administrative Practice, and two (2) credits for Personal Development
- (b) a full day training, a 300+ page workbook, access to FAI's Financial Info Portal for 12 months and ongoing access to FAI's Scam Alerts

Additional information

Prerequisites: none

Advanced preparation: none

Program level: Basic

Delivery Method: Group-live

Financial Awareness Institute (FAI) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors (ID # 108978). Gary Tagtmeier is the main instructor for FAI. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417, Website: www.nasba.org Complaints regarding FAI and Gary Tagtmeier can be directed to our customer support department by calling (630) 963-7000, or by writing to the address below.

