Course Description

Join our CPA/FP Bootcamp for a day of invaluable insights and expert strategies. Discover a fresh perspective on estate planning, debunk common myths, and explore solutions for long-term care challenges. Learn about tax-saving opportunities and gain essential tips to safeguard your clients from scams. Don't miss this transformative learning experience designed to elevate your practice.

Objectives

- Challenge conventional ideas, encouraging attendees to adopt innovative approaches to estate planning for their clients;
- Dispel prevalent misconceptions surrounding probate, IRA trusts, and joint trusts, enabling attendees to guide clients with accurate information;
- Equip professionals with knowledge about diverse long-term care options, including ALTCS and VA Aid & Attendance, and help them avoid common mistakes related to eligibility and asset preservation;
- Explore strategies to protect the elderly, including insights from the keynote speaker, Brian Watson from R.O.S.E., enhancing attendees' abilities to provide comprehensive care;
- Educate attendees on recognizing and preventing scams, ensuring they can advise clients effectively in safeguarding their financial well-being;
- Provide dedicated time for attendees to engage with sponsors during the lunch session, fostering valuable professional relationships and collaborations;

Continuing Education Credits

5.5 Credits – Self Report to Arizona Board of Accounting

5.5 Credits –Approved for CFP Board

*4 Credits – Arizona Department of Insurance**

**CEUs should be approved any day. Please check the registration linked for credit approval status.*

Register Online or Scan Code
https://dkarplaw.com/bootcamp/

Ticket Information
Early Bird
$49 until 10/27/23
$59 after 10/27/23

Group Discount | Buy 4, Get the 5th Free!
$196 until 10/27/23
$236 after 10/27/23

Agenda

7:30am - 8:30am	Doors open: Registration and Breakfast
8:30am	Welcome Introduction
8:50am - 9:15am	A Different Way to Think About Estate Planning with Your Clients – Attorney Dave Karp
9:15am - 9:40am	Dispelling Estate Planning Myths Seen on the Radio and Web – Attorneys Dave Karp and Shanelle Schmitz
9:50am - 11:05am	What If Your Client Needs Long-Term Care Assistance? – Attorney Dave Karp and Public Benefits Coordinator Lawrence Shafer
11:20am - 11:50am	Platinum Sponsor Presentation
11:50pm - 12:40pm	Lunch - Sponsored by SMEAD Capital Management
12:40pm - 1:30pm	Charitable Planning Options for Your Clients – Vice President of Philanthropic Advising at Phoenix Children's Hospital, Nicola Lawrence
1:40pm - 2:30pm	Tips to Help Your Clients Avoid Scams – Brian Watson with R.O.S.E. (Resources/Outreach to Safeguard the Elderly)
2:40pm - 3:30pm	Opportunities to Help Your Clients Save Taxes – Attorney Dave Karp

How to Register:

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Questions, Comments, Concerns?
Feel free to reach us at
events@dkarplaw.com

Lunch Brought To You By

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Bootcamp CPAs and Financial Planners

Bootcamp

CPAs and Financial Planners

Join us for the 1st Annual CPAs and Financial Planner Bootcamp!

November 9, 2023
8:30 am – 3:30 pm

DoubleTree Hotel
445 S. Alvernon Way
Tucson, AZ 85711

Continuing Education Credits Through: CFP Board, Arizona Dept. of Insurance, Arizona Board of Accounting

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