

# Estate Planning 1.5

A monthly CE luncheon @ OCCF

The Cannon Estate Planning Teleconference Series

*Save The Date for the Final Teleconferences in 2015:*

**Sept. 15**

**The Ascendency of Income Tax Planning**

Register online: Aug. 19 – Sept. 8

**Oct. 20**

**Post-Mortem Estate Planning**

Register online: Sept. 17 – Oct. 13

**Nov. 17**

**Retirement Benefit Planning: Dealing With the Uncertainties**

Register online: Oct. 22 – Nov. 10

**Dec. 8**

**Ethics Issues in Trust Administration**

Register online: Nov. 18 – Dec. 1

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The Cannon Estate Planning Teleconference Series

*The Oklahoma City Community Foundation invites you to join us at one or more of the final four Estate Planning 1.5 teleconferences for 2015. We are pleased to continue to partner with Cannon Financial Institute to offer this free, monthly series that provides 1.5 hours of continuing education credit for attorneys, financial planners, trust officers and CPAs. Join us and learn more about the latest on tax laws, marketplace trends and other topics affecting wealth management and estate planning professionals. We look forward to seeing you at an Estate Planning 1.5!*

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**Time:** 11:30 a.m. – 1:30 p.m. Presentation starts promptly at noon.

**Location:** All teleconferences will take place at the Oklahoma City Community Foundation located at 1000 N. Broadway Ave. Free parking is available on the east side of the building. Enter the parking lot via North 9th Street.

**Cost:** There is no charge for the series. Lunch provided. Registration by deadline is required.

**CE:** Each teleconference provides 1.5 hours of continuing education credits for CPAs, CFPs, CTFAs, CWSS, CLEs, AFIMs, CLUs, ChFCs and attorneys. Cannon will report attendance for attorneys and CFPs only. All other attendees will be presented with a CE certificate to self-report attendance to the appropriate crediting organizations.

**How to Register:** Online registration timeframes are listed in the calendar above. Registration is first-come, first-served as limited seating is available. Registration deadlines are one week prior to each teleconference and you must register for each teleconference. **Register online at [www.occf.org/CEopportunities](http://www.occf.org/CEopportunities).** Visit [occf.org/CEopportunities](http://occf.org/CEopportunities) for the remaining 2015 schedule.

**Questions?** Contact Joe Carter at 405/606-2914 or [j.carter@occf.org](mailto:j.carter@occf.org).