

Learning Objectives

Older clients tend to have unique concerns. For example, they may want to address their potential longevity/financial resources, tax-efficient gifting, their estates and more.

Upon completion of this course, participants will be able to:

- Identify lifetime gifting techniques.
- Identify long-term care considerations.
- Recognize asset protection techniques.
- Recognize the primary components of wills.
- Identify symptoms of elderly financial abuse.

This course will allow you to become knowledgeable in those areas of most concern to today's older clients.