



National Association of Estate Planners & Councils

1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

General Course Certificate of Completion

Attendee Name: _____

Program Title: Creative Ways to Fund Business Owner Retirement

Delivery Method: Webinar – Live Delivery

Instructor(s): Vincent M. D'Addona, MSFS, CLU®, ChFC®, RICP®, CExP®, AEP® (Distinguished)

Program Desc: Every Business Owner leaves their businesses whether voluntarily or involuntarily. Consideration in the positioning and use of life insurance prior to the exit can mean a huge difference in ultimate retirement cash flow for the Business Owner. This intermediate presentation will provide valuable food for thought for the professional who has business owner clients.

Vincent M. D'Addona MSFS, CLU®, ChFC®, RICP®, CExP®, AEP® (Distinguished) is an advisor at Strategies for Wealth with 41 years of experience providing services in three core areas: Estate Planning, Exit Planning for the owners of closely held businesses and Investment Coaching. Vince has served as workshop sub-committee chair for the AALU 2010 annual meeting, in addition to being a featured speaker in 2005. Vince is a Life and Qualifying member of MDRT, Court of the Table for 31 years and Top of the Table for 17 years and has spoken at the MDRT National Meeting. Vince is a member of the Forum400, Financial Planning Association, the National Association of Insurance and Financial Advisors, and the National Association of Estate Planning Councils. He has served as president of the New York City Chapter of the Society of Financial Services Professionals, and on the boards of the New York City Association of Insurance and Financial Advisors and the New York Estate Planning Council.

Sponsor: National Association of Estate Planners & Councils

Program Date: Live Program Held August 12, 2020

Date Viewed: _____

Location: Webinar Delivery

Instruction Minutes: 60

Eleanor M. Spuhler, Administrator
Authorized Provider Official

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