Practice Operations & Personal Planning©

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COURSE DESCRIPTION

Learn to identify what you need to know about: (a) retirement plan design, funding and asset accumulation; (b) directing your estate at death in the manner you choose; and (c) maximize profitability and minimize stress of practice through business planning.

LEARNING OBJECTIVES

1. Evaluate your future or existing practice options and possible real estate ownership in light of the retirement plan contribution levels you choose to make, while protecting those assets you have.

2. Understand the necessary steps to direct your estate at death in accordance with your wishes.

3. Understand how strategic planning can help your practice profitability and minimize your stress.