FULCRO

WE CORDIALLY INVITE YOU TO:

WHO'S NEXT IN YOUR BUSINESS

A seminar on safeguarding your business value. Succession planning for business owners, focused on business valuation, and tax, legal and personal financial planning considerations pursuant to retirement.

We would like to invite you to our seminar addressed to Accountants, CPAs, attorneys, and finance professionals. Approved by the National Association of State Boards of Accountancy (NASBA) 3 for hours of CPA continuing education.

Friday, April 26, 2024
1:30-4:30 pm
Edificio ILA, Avenida Kennedy

CPE Credits: 3 (2 Finance, 1 Taxes)
Delivery Method: Group Live
Workshop Fees: $99

PANELISTS

Daniel González-Maisonet, CPA, MBA
Owner, Investment Adviser Representative & Financial Planner

Lcdo. Wilfredo Miguez
Miguez Law Office

CVA Raúl Ortiz
Certified Valuation Analyst

BOOK HERE

OBJECTIVE

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

1. Understand the fundamental legal, tax and financial risks that threaten the continuation of a business, such as unexpected death, disability, unbridled, bankruptcy, divorce, and retirement of a business owner, stockholder, or partner of a business.
2. Understand the valuation fundamentals when conducting a personal financial plan, focused on retirement planning, when the business value is the main asset for the business owner's retirement planning.
3. Understand the tax planning basics and business owner structure in the context of a personal financial plan.
4. Understand the legal fundamentals for the business owner pre-retiree and retired, considering that the business ownership could be the main source of funds of the business owner's portfolio of assets considered located in Puerto Rico and/or in the USA mainland.

Visionis Inc (Sponsor Number 112875), is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org

Cancellations received less than 7 calendar days prior to the session start date are subject to a US $25 nonrefundable service charge. This fee will be waived if another training program is purchased at the time of cancellation. Confirmed reservations not canceled the day before the start of the program will be billed at the full rate. All requests for refunds will be processed within 30 days following the program. For more information regarding administrative policies such as complaints and refunds, please contact Néstor Kercadó at info@visionispr.com or (787) 537-2236.

Registration E-mail (all instructors): daniel@fiducialadviser.com
Date: Friday, April 26, 2024
Hours: 1:30pm-4:30 pm
CPE Credits: 3
Delivery Method: Group Live
Workshop fees: $125
Level: Basic
Audience: Accountants, CPAs, attorneys, and finance professionals.
Program Description: Succession planning for business owners, focused on business valuation, tax planning, legal planning, and personal financial planning, highlighting retirement planning.

The Fiducial Adviser
Financial Planning • Investment Advisory • Wealth Management

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