National Life Group®
Experience Life®

CPA ADVANTAGE®

CPA SYMPOSIUM

November 14–17, 2018 • Wynn • Las Vegas, NV

An opportunity for CPAs to expand their practices by partnering with a member of the financial services industry.

While financial advisors and CPAs are different, we believe that the services provided by these two professions complement one another. By partnering with a National Life Group financial advisor, you can not only broaden the scope of the services you offer, but you can provide your clients with the advanced planning strategies and solutions that you yourself are recommending - solutions that can help them achieve their personal financial objectives.

A majority of states now allow CPAs to accept commissions and/or contingency fees* on the sale of financial products – an opportunity that many of your peers are finding especially helpful given the slow but steady erosion of your traditional sources of income. By taking a larger role in helping clients implement their financial plans, these CPAs are finding that they're not only able to increase the level of services they offer, but possibly their profitability as well.

"I just wanted to share some thoughts regarding National Life Group's CPA Symposium. I can't begin to tell you how impressed I was with your firm's commitment to servicing this niche [marketplace]. As you know, many financial services providers have tried to align their services with the accounting profession, only to find tremendous obstacles along the way – chief among them their inability to coordinate the financial advisor (at their firm) with the CPA's needs and wants which – quite candidly – can be quite different than those of the financial advisor.

I was so impressed to see both financial advisors and their CPA partners at the session working in tandem and, more importantly, talking through the difficult and sometimes delicate issues of building a long-term trusting relationship. There is no question in my mind that your approach and style will produce great results for National Life Group. The accounting profession is a group of people looking to work with someone they can trust. And right now, I can think of no better ally than National Life Group."

Allan D. Koltin, CPA
President, Koltin Consulting Group

*Source: Based on your state's requirements.

Consider the benefits:

- You, the CPA, want to do every thing you can to help your clients accomplish their financial goals.
- The life insurance / financial services professional has access to the products and services these successful clients need to help bring their goals to fruition.
- You can see how establishing the right relationship could turn into a win-win situation for both parties.

That's where National Life Group's CPA Symposium can help.

This Symposium will help you:

- Identify specific client profiles - what are your clients looking for?
- Understand the tools, resources, and support that are available to help you help your clients meet their financial goals and objectives.
- Gain a better understanding of both client attitudes and your role in providing the financial products and services they need.
- Learn how other CPAs are taking advantage of this opportunity.
- Learn product and concept solutions to help meet your clients' complex needs.

Should you attend?

Yes! If you are interested in expanding your practice, increasing the level of services you offer your clientele, and possibly increasing your profitability, National Life Group's CPA Symposium may be just the opportunity you've been waiting for.

Date: November 14-17, 2018 | **Location:** Wynn • Las Vegas | **Designed for:** 14 CPE credits | **Course Level:** Intermediate
Delivery Method: Group Live | **Prerequisites:** None | **Cost:** Tuition for attendance is $700.00 per person.[1]

Refund policy: In the event that an insufficient number of registrants forces the cancellation of the program, each participant will be notified. The decision to cancel a program is made one week prior to the scheduled date. Full refunds, where applicable will be made.

Complaints: Complaints should be submitted in a written format to the program sponsor. Cases will be addressed on an individual basis. National Life Group (NASBA I.D. #103339) 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. The 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.learningmarket.org

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1 This fee includes your registration and seminar materials, hotel accommodations for 3 nights, and breakfast and lunch on meeting days. Attendees are responsible for their own airfare and transportation to the meeting.