



Center for Continued Learning

Identify and Sell Antiques for Estate and Financial Planning

Presented by:

Lori Verderame, PhD
Antiques Appraiser

August 25, 2016
8:00 AM-Noon Live Webinar Broadcast
and
1:00-5:00 PM at The Woodlands in Wilkes-Barre, PA

Visit our WEB PAGE for information and online registration at:
<http://www.wilkes.edu/continuedlearning>

Center for Continued Learning
Wilkes University
84 West South Street
Wilkes-Barre, PA 18766

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2016 Public Accounting Seminar Schedule

Future Live Seminars

<u>Date</u>	<u>Topic</u>	<u>CPE Hrs</u>
July 28	Setting Up Nonprofits	A:2; T:2
August 4	Computer Security	O:4
August 11	Governmental Accounting	A:4
September 22	Accounting and Auditing Update	A:4
October 27	Ethics - Duties & Resp. of the Tax Professional	E:4
*Nov 3	State Tax Update	T:8
Nov 10	Local Tax Update	T:4
Dec 1	Federal Tax Update	T:4
Dec 8	Financial Statement Disclosures	A:4

Seminars are held at The Woodlands Inn and Resort, Highway 315, Wilkes-Barre on Thursdays from 1:00-5:00 PM. For further information, contact the Center for Continued Learning at (570) 408-5615 or toll-free at 1-800-WILKES-U, ext. 5615, fax # (570) 408-7912
* This session is scheduled from 8:00 AM to 5:00 PM.

Future Live Webinars

<u>Date</u>	<u>Time</u>	<u>Topic</u>	<u>CPE Hrs</u>
Aug 25	8 AM-Noon	Identify & Sell Antiques	O:4
Oct 28	8 AM-Noon	Ethics - Duties & Resp. of Tax Professional	E:4
TBA	TBA	A&A Update	A:4

Self-Study Courses

Accredited for PA Accountants:
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Accreditation

Wilkes is fully accredited by:

The Pennsylvania State Board of Accountancy
The State of New Jersey Board of Accountancy



Wilkes University 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 the 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

Program

Identify and Sell Antiques for Estate and Financial Planning

The alternative asset classes of fine art, antiques, and collectibles help experts in the financial services industry to strongly connect with their clients and help them meet their financial goals. This long overlooked but client-coveted alternative asset class is the topic of discussion as we embark upon history's greatest transfer of wealth.

Discussion points include:

1. How alternative asset class of fine art, antiques and collectibles should be considered in the overall financial plan.
2. Information about the various types of appraisals and evaluation methods for the alternative assets of fine art, antiques, jewelry, and collectibles.
3. The need for insurance coverage for alternative asset classes.
4. How the great wealth transfer is an opportunity to connect with clients from baby boomers to millennial generation using technology and family heirlooms.
5. How objects collected may be funding sources financial plans.
6. Methods to monetize unwanted art, antiques, and collectibles to fund other areas of the financial plan and portfolio.
7. How to advise clients about the status of their collections as a financial investment and a personal passion.

4 hours CPE Credit in the Category of Other

General Information

Date: August 25, 2016
Time: 1:00 PM-5:00 PM
Delivery Method: Group Live
Seminar Location

The Woodlands Inn and Resort
1073 Highway 315, Wilkes-Barre, PA 18705

Date: August 25, 2016
Time: 8:00 AM-Noon
Delivery Method: Group Internet-Based
Seminar Location: Webinar

Additional Information
Prerequisites: None
Early Bird Discount Fee: \$50- Registration and payment must be received by close of day Monday prior to the seminar. Registrations may be made by telephone, mail or fax. Payment by check or credit card (Visa, Master Card or Discover) will be accepted.

Seminar Fee: \$55- Registrations made within 2 days of the seminar.

Refund Policy
Cancellations: Credit will be given for a seminar in the same fiscal year if the cancellation is received 24 hours prior to the seminar.
For more information regarding refund, complaint and/or program cancellation policies, please contact our offices at (570) 408-5615.

Registration Information
Online registration: www.wilkes.edu/continuedlearning
If you forgot your login & password please call (570) 408-5615. Please do not create another account.

Or mail completed form and payment to:
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Center for Continued Learning
84 West South Street
Wilkes-Barre, PA 18766
Phone: (570) 408-5615 or 1-800-WILKES-U, ext. 5615
Fax: (570) 408-7912
Email: continuedlearning@wilkes.edu
Please call 1-800-WILKES-U ext. 5615 if you require assistance with hearing, vision or mobility to make this program accessible.

Identify and Sell Antiques for Estate and Financial Planning
(Please check one) August 25 1-5 PM at The Woodlands in Wilkes-Barre, PA **Registration**
 August 25 8 AM-Noon Live webinar broadcast
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