

Free Continuing Education Course for two or four credits

Puzzled by 529s?



Let us help you solve your client's questions with two or four hours of CE credit for CPAs, CFPs, CIMA and insurance professionals, breakfast included.

Here's your chance to unscramble the tax issues and benefits of 529 college savings plans. Learn the latest tax law, rules and regulations that impact your clients' situations, and how to recognize opportunities related to 529s that can benefit the families you serve. There is no fee to attend and breakfast will be provided.

Topics covered will include estate planning, state tax benefits and incentives, financial aid, distribution planning and important family situations. Real world examples will allow attendees to learn from the questions, problems and opportunities that others have encountered, and will teach methods for a deeper engagement with clients and prospects.

Come expand your knowledge of how 529 plans work to save your client on income tax, estate tax or fit into the larger financial planning picture.

4 CE credits

Grand Junction	Thursday, April 28	8:30am-12:30 pm	Colorado Mesa University
Lakewood	Thursday, May 5	8:30am-12:30 pm	FirstBank of Colorado
Loveland	Thursday, June 9	8:30am-12:30 pm	Embassy Suites Hotel
Colorado Springs	Thursday, July 14	8:30am-12:30 pm	Breglio, Long and Associates

2 CE credits

DTC	Wednesday, May 11	7:30am-9:30am	Maggiano's DTC/Denver South
Boulder	Thursday, August 18	8:30-10:30 am	TBD

To register <https://www.collegeinvest.org/advisors/cpe-registration>

Need free continuing education? Let us come to you.

For groups of 8 or more we can teach 1-4 hours of continuing education for 1-4 credits, all based around 529s. Estate Planning, Intergenerational Wealth Transfer, Financial Aid, or even just the basics with Intro to 529s are a few of the courses available. We can even provide breakfast or lunch. CE credit is for CFP, CPA, CIMA or Insurance.

Important Considerations

To learn about CollegeInvest's 529 program, its objectives, risks, charges, expenses, limitations, restrictions and qualifications regarding the Plans' benefits and potential tax advantages, please read and consider carefully the Program Disclosure Statements (PDS) available at www.collegeinvest.org before investing. Also, check with your or your beneficiary's home state to learn if it offers tax or other benefits for investing in its own plan.

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Contributions to the Plan(s) are deductible from Colorado State income tax in the tax year of the contribution, up to your Colorado taxable income for that year. Such deductions are subject to recapture in subsequent years in which non-qualified withdrawals are made.

Contributions between \$14,000 and \$70,000 made in one year can be prorated over a five-year period without incurring federal gift taxes or reducing your unified estate and gift tax credit. If the account owner dies before the end of the five-year period, a prorated portion of the contribution will be included in his or her taxable estate. If you contribute less than the \$70,000 maximum, additional contributions can be made without incurring federal gift taxes, up to a prorated level of \$14,000 per year. Federal gift taxation may result if a contribution exceeds the available annual gift tax exclusion amount remaining for a given student in the year of contribution.

CollegeInvest is a not-for-profit division of the Colorado Department of Higher Education. As such, our primary goal is to help students get an education beyond high school. We provide expert information, simple planning tools, scholarships, and savings plans for Colorado families.



CollegeInvest

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