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NGA Webinar

Dirty Little Secrets of the Financial Industry & Fees

About the course:

The financial industry does a great job of confusing people by over complicating the simplest of things. The goal of this webinar is to help expose some of those dirty little secrets, specifically related to the different products and fees charged by the industry. It will go into great detail of the true “All-In” costs of specific products with real life case examples, and will provide valuable “red flag” information on many issues that signal that it is time to make a change. The presentation will also provide valuable tools and resources to help private professional fiduciaries select, partner and retain a competent investment advisor, and will go into detail on decision making protocols to help fiduciaries protect themselves from unnecessary risk.

The webinar course will be held

Tuesday, August 9 at 1 p.m. Eastern (noon Central, 11:00 Mountain, 10:00 Pacific).
This webinar will last for 60 minutes.

About the presenter:

Daniel Cutter is a Vice President and Senior Financial Advisor at Merrill Lynch. He helped to create the Merrill Lynch Fiduciary and Special Needs Group and has been in the financial industry since 1999. Daniel earned his MBA in Finance from the University of San Francisco and is a Chartered Retirement Planning CounselorSM. He is a special consultant on the book, ‘Special Needs Trusts: Planning, Drafting, and Administration’ through the California Continuing Education of the Bar.

Continuing Education Credit:

This webinar qualifies for 1.0 hours of continuing education from the Center for Guardianship Certification.

Note: Registration is for one entrant. Any other individuals who would like to join this session are required to complete their own registration forms. (The registration fee is set per person, not per connection.) This also applies to CEU credits. Only registered individuals will receive the CEU credits available with this webinar.



COURSE REGISTRATION
Dirty Little Secrets of the
Financial Industry & Fees

Tuesday, August 9, 2016

NGA reserves the right to cancel the course and refund payment if enrollment does not meet minimum requirements by August 5.

MEMBER RATES – *Discounted rates apply only to current NGA members and up to three employees of NGA's organization members. Membership in a state association does not qualify for NGA member rate.*

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