

Florida Trust & Wealth Management School

July 21-26, 2024

Junior Year Schedule

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TIME	July 21 SUNDAY	July 22 MONDAY	July 23 TUESDAY	July 24 WEDNESDAY	July 25 THURSDAY	July 26 FRIDAY
8:00 - 9:45 AM		Estate & Gift Tax LESTER LAW	Retirement Planning MARK PARTHEMER	Individual & Fiduciary Income Taxation PETER KNIZE	Investment Management CHRISTINE TAYLOR	Exam 8:00 - 10:00 AM
9:45 - 10:00 AM		BREAK	BREAK	BREAK	BREAK	BREAK
10:00 - 11:45 AM		Estate & Gift Tax LESTER LAW	Retirement Planning MARK PARTHEMER	Individual & Fiduciary Income Taxation PETER KNIZE	Investment Management CHRISTINE TAYLOR	Graduation 10:30 - 11:00 AM
11:45-12:45 PM		LUNCH	LUNCH	LUNCH	LUNCH	
12:45 - 2:30 PM		GST Tax LESTER LAW	Estate Planning Document Analysis RANDY POPL	Individual & Fiduciary Income Taxation PETER KNIZE	Charitable Planning CANDANCE MARSHALL/NIKKI PACKER	
2:30 - 2:45 PM		BREAK	BREAK	BREAK	BREAK	
2:45 - 4:30 PM	REGISTRATION 5:00 - 5:30 PM	Risk Management & Insurance Solutions MAC GARDNER	Estate Planning Document Analysis RANDY POPL	Individual & Fiduciary Income Taxation PETER KNIZE	Case Study in Advanced Planning HUGH DOERR/ BURNS DOBBINS	

5:30 - 6:00 PM	Class Pictures	Attendance at Class Pictures & Banquet is required
6:00 PM	Welcome Banquet	

Attendance at Graduation is requested
