# Approved IMCA Credits

Final Document

| Engage Conference | Engage Session Number | Engage Session Title | Minutes |
|---|---|---|---|
| Engage Overall Conference | ENG1702 | Crossing the Generational Divide: Unlocking the Power of Generations to Grow Your Business - ENG1702 | 50 |
| Engage Overall Conference | ENG1703 | Lessons Learned in the Shark Tank - ENG1703 | 50 |
| Engage Overall Conference | ENG1704 | Professional Issues Update - ENG1704 | 75 |
| Engage Overall Conference | ENG1705 | Cracking Creativity: Re-engaging Our Innate Creativity for Greater Productivity and Growth - ENG1705 | 50 |
| Engage Overall Conference | ENG1706 | Grantor Trusts - ENG1706 | 75 |
| Engage Overall Conference | ENG1707 | The Best 10 Estate Planning Ideas Today - ENG1707 | 50 |
| Engage Overall Conference | ENG1709 | New Trends in Estate Planning - ENG1709 | 50 |
| Engage Overall Conference | ENG1710 | Planning for the Terminally Ill Client - ENG1710 | 50 |
| Engage Overall Conference | ENG1711 | How to Strategically Select a Niche and Profit with Less Effort - ENG1711 | 50 |
| Engage Overall Conference | ENG1712 | Charitable Planning Essentials to Grow your Business - ENG1712 | 50 |
| Engage Overall Conference | ENG1713 | Due Diligence and Investment Manager Selection - ENG1713 | 50 |
| Engage Overall Conference | ENG1714 | Student Loans: What Advisors Need to Know - ENG1714 | 50 |
| Advanced Estate Planning | EST1701 | Recent Developments in Estate Planning - Part 1 - EST1701 | 75 |
| Advanced Estate Planning | EST1702 | Recent Developments in Estate Planning - Part 2 - EST1702 | 75 |
| Advanced Estate Planning | EST1704 | Advanced GST - EST1704 | 75 |
| Advanced Estate Planning | EST1706 | Portability: Estate Planning in the NOW Frontier - EST1706 | 75 |
| Advanced Estate Planning | EST1707 | Looking Beyond our Borders—U.S. Income, Estate and Gift Tax Implications - EST1707 | 50 |
| Advanced Estate Planning | EST1708 | Income Tax Consequences of Funding Bequests - EST1708 | 50 |
| Advanced Estate Planning | EST1709 | Advanced CRT - EST1709 | 50 |
| Advanced Estate Planning | EST1710 | Estate Planning for Non-taxable Estates - EST1710 | 50 |
| Advanced Estate Planning | EST1711 | Fiduciary Accounting - EST1711 | 50 |
| Advanced Estate Planning | EST1712 | Retirement Accounts in First and Second Marriages: The Fun Begins - EST1712 | 50 |
| Advanced Estate Planning | EST1713 | Estate, Gift, Portability and Basis Consistency Hot Issues and Practicalities - EST1713 | 50 |
| Advanced Estate Planning | EST1714 | Running the Numbers - EST1714 | 50 |
| Advanced Estate Planning | EST1716 | Debunking Estate Planning | 50 |
| Advanced Estate Planning | EST1721 | Portability after Rev. Proc. 2016-49 and The 'Portability Qtip' - EST1721 | 75 |
| Advanced Estate Planning | EST1722 | Updates, Worries, and Strategies for Older Americans and those with Special Needs - EST1722 | 75 |
| Advanced Estate Planning | EST1725 | Estate Planning for IRAs - EST1725 | 50 |
| Advanced Estate Planning | EST1726 | Estate Planning for the Ultra Wealthy - Part 1 - EST1726 | 50 |
| Advanced Estate Planning | EST1727 | IRS Compliance - EST1727 | 50 |
| Advanced Estate Planning | EST1728 | Post-mortem Planning for the 99% of Us - EST1728 | 50 |
| Advanced Estate Planning | EST1729 | Estate Planning for the Ultra Wealthy - Part 2 - EST1729 | 50 |
| Advanced Estate Planning | EST1731 | AICPA Trust, Estate, and Gift Tax Technical Resource Panel (TRP) Q&A Roundtable Discussion - EST1731 | 50 |
| Advanced Estate Planning | EST1733 | Advanced Fiduciary Income Tax Issues - EST1733 | 75 |

| Engage Conference | Engage Session Number | Engage Session Title | Minutes |
|---|---|---|---|
| Advanced Estate Planning | EST1734 | Applying 2704 in the Real World - EST1734 | 50 |
| Advanced Estate Planning | EST1735 | What the public accountant need to know about Tax Planning for shareholders of S Corporations - EST1735 | 75 |
| Advanced Estate Planning | EST1737 | Pre-Mortem Planning - EST1737 | 75 |
| Advanced Estate Planning | EST1738 | Non Traditional Families - EST1738 | 75 |
| Advanced Estate Planning | EST1739 | 1411 and Trusts - EST1739 | 75 |
| Advanced Estate Planning | EST1741 | Taxation of Trusts Owning Pass-Through Entities - EST1741 | 75 |
| Advanced Estate Planning | EST1742 | Practical Applications of Recent Tax Developments - EST1742 | 50 |
| Personal Financial Planning | PFP1701 | Economic Update - PFP1701 | 50 |
| Personal Financial Planning | PFP1702 | The Need and Value of Longevity Insurance for Retirees - PFP1702 | 75 |
| Personal Financial Planning | PFP1703 | Implementing Financial Life Planning - PFP1703 | 75 |
| Personal Financial Planning | PFP1704 | The Key Commandments of Wealth - PFP1704 | 75 |
| Personal Financial Planning | PFP1705 | Probable Returns: Why the Next Decade Will Have Unexpected Outcomes - PFP1705 | 75 |
| Personal Financial Planning | PFP1706 | Fiduciary Responsibilities of Trustees - PFP1706 | 75 |
| Personal Financial Planning | PFP1707 | IRA and Retirement Planning Update - PFP1707 | 75 |
| Personal Financial Planning | PFP1708 | Transformational Growth: What Top Advisory Firm Leaders are Doing to Gain 31% Faster Growth - PFP1708 | 75 |
| Personal Financial Planning | PFP1709 | Buy/Sell Agreements - PFP1709 | 75 |
| Personal Financial Planning | PFP1710 | Preventing Behavioral Biases from Sabotaging Long-Term Objectives - PFP1710 | 75 |
| Personal Financial Planning | PFP1711 | Asset Protection Inside and Out of Life Insurance - PFP1711 | 75 |
| Personal Financial Planning | PFP1712 | Variable Annuities - Uses in Planning - PFP1712 | 75 |
| Personal Financial Planning | PFP1713 | The Future of Financial Planning in the Digital Age - PFP1713 | 75 |
| Personal Financial Planning | PFP1714 | Look Before You Leap! Planning at Cliff of Capacity - PFP1714 | 75 |
| Personal Financial Planning | PFP1715 | Investment Topic - PFP1715 | 75 |
| Personal Financial Planning | PFP1716 | Practitioners Panel: CPA Perspective - PFP1716 | 75 |
| Personal Financial Planning | PFP1717 | Tax Efficient Spending in Retirement - Tax Efficient Drawdowns, Etc. - PFP1717 | 75 |
| Personal Financial Planning | PFP1718 | Creating Effective Compensation Plans - PFP1718 | 75 |
| Personal Financial Planning | PFP1719 | Wealth Management Unwrapped: Practical Steps for Improving the Investor/Advisor Relationship - PFP1719 | 75 |
| Personal Financial Planning | PFP1720 | A Debate: What is the Key Driver in Helping Clients Reach their Goals - PFP1720 | 75 |
| Personal Financial Planning | PFP1721 | Mitigating Threats to Clients' Assets and Lifestyle - PFP1721 | 75 |
| Personal Financial Planning | PFP1722 | The Impact of Dynamic Approaches on Optimal Retirement Income Strategies - PFP1722 | 75 |
| Personal Financial Planning | PFP1723 | Let’s Talk! Why Gender matters in firms and client relationships - PFP1723 | 75 |
| Personal Financial Planning | PFP1724 | Math Modeling Matters in Divorce - PFP1724 | 75 |
| Personal Financial Planning | PFP1725 | The Incredible Shrinking Alpha - PFP1725 | 75 |
| Personal Financial Planning | PFP1726 | Heads You Win - Tails You Win; New Policy Valuation Methodology for Seniors - PFP1726 | 75 |
| Personal Financial Planning | PFP1727 | Reverse Mortgages - PFP1727 | 75 |
| Personal Financial Planning | PFP1728 | Preparing for the Future - PFP1728 | 75 |
| Personal Financial Planning | PFP1729 | CPAs Role in Estate Administration Issues - PFP1729 | 75 |
| Personal Financial Planning | PFP1730 | A Framework for Portfolio Construction - PFP1730 | 75 |
| Personal Financial Planning | PFP1731 | It's Risky Business: Litigation in the World of Estate Planning - PFP1731 | 75 |
| Personal Financial Planning | PFP1732 | The End of the World ... and Other Opportunities - PFP1732 | 75 |

| Engage Conference | Engage Session Number | Engage Session Title | Minutes |
|---|---|---|---|
| Personal Financial Planning | PFP1733 | Retirement Panel - PFP1733 | 50 |
| Personal Financial Planning | PFP1734 | Health Insurance in Retirement (Medicare & Beyond) - PFP1734 | 50 |
| Personal Financial Planning | PFP1735 | Delivering an Exceptional Client Experience - PFP1735 | 50 |
| Personal Financial Planning | PFP1736 | Ensuring Your Clients' Good Fortune Doesn't Become Their Children's Misfortune - PFP1736 | 50 |
| Personal Financial Planning | PFP1737 | An In-Depth Look At Optimal Rebalancing Strategies - PFP1737 | 50 |
| Personal Financial Planning | PFP1738 | Life Insurance Tips for the Financial Planning Professional - PFP1738 | 50 |
| Personal Financial Planning | PFP1739 | What Due Diligence do you Need to Select Long Term Care Facility - PFP1739 | 50 |
| Personal Financial Planning | PFP1740 | 25 Advisor Technologies Under $25/month - PFP1740 | 50 |
| Personal Financial Planning | PFP1741 | Investment Topic - PFP1741 | 50 |
| Personal Financial Planning | PFP1742 | Ways to Use Life Insurance Other Than the Death Benefit - PFP1742 | 50 |
| Personal Financial Planning | PFP1743 | Planning in a Low Return Environment - PFP1743 | 75 |
| Personal Financial Planning | PFP1744 | Business Valuation and Succession Planning - PFP1744 | 75 |
| Personal Financial Planning | PFP1745 | Practical Applications of Recent Developments - PFP1745 | 75 |
| Personal Financial Planning | PFP1746 | The Psychology of Money - PFP1746 | 75 |
| Personal Financial Planning | PFP1747 | Risk Management Hot Topic- Election and Legislative Impact - PFP1747 | 75 |
| Personal Financial Planning | PFP1748 | New World of Social Security Planning - PFP1748 | 50 |
| Personal Financial Planning | PFP1749 | Utilizing Assessment Tools to Improve Team & Client relationships - PFP1749 | 50 |
| Personal Financial Planning | PFP1750 | High Profile Estate Lessons Learned (Empty Mansions) - PFP1750 | 50 |
| Personal Financial Planning | PFP1751 | Putting Investors First: The Client-Manager Relationship in a Goals-Based Framework - PFP1751 | 50 |
| Personal Financial Planning | PFP1752 | What to Discuss With Your Aging Clients: Planning and Paying for Long Term Care - PFP1752 | 50 |
| Personal Financial Planning | PFP17S1 | Investment Planning from the Tax Return- integrating technology to service higher net worth clients - PFP17S1 | 50 |
| Personal Financial Planning | PFP17S3 | Enhancing Personal Financial Planning Opportunities Through Innovative 401(k) Plan Investments and Designs | 50 |
| Tax Strategies | TAX1704 | FLPs and Use of Partnerships in Estate Tax Planning - TAX1704 | 75 |
| Tax Strategies | TAX1708 | 30 Ways a Client Can Transfer Ownership to a Successor - TAX1708 | 75 |
| Tax Strategies | TAX1709 | Charitable Planning for Entrepreneurs - TAX1709 | 75 |
| Tax Strategies | TAX1710 | Retirement Accounts in First and Second Marriages: The Fun Begins - TAX1710 | 75 |
| Tax Strategies | TAX1712 | Planning for Divorce: The Tax Ramifications - TAX1712 | 75 |
| Tax Strategies | TAX1714 | 1031 Update - TAX1714 | 50 |
| Tax Strategies | TAX1723 | How Warren Buffet Did It: How CPAs can apply this to advise their clients - TAX1723 | 75 |
| Tax Strategies | TAX1724 | Real Estate Tax Update - TAX1724 | 75 |
| Tax Strategies | TAX1728 | Split Interest Trusts - TAX1728 | 50 |
| Tax Strategies | TAX1732 | A professional and personal view of the administration of special needs trusts - TAX1732 | 50 |
| Tax Strategies | TAX1736 | Top 10 Planning Tips for Closely Held Businesses - TAX1736 | 75 |
| Tax Strategies | TAX1739 | Post-mortem Administrative Checklists - TAX1739 | 50 |
| Tax Strategies | TAX1740 | Planning for Non-resident Aliens in the U.S. - TAX1740 | 50 |
| Tax Strategies | TAX1741 | Tax Strategies for Retirees - TAX1741 | 75 |
| Tax Strategies | TAX1744 | Beyond Page 1 of the K-1 - TAX1744 | 75 |
| Tax Strategies | TAX1747 | Powerful Income Tax Planning Opportunities Through Estate Planning Strategies and Other Practical Advice | 75 |
| Tax Strategies | TAX1749 | Taking it Home: Best Tax Tips Panel - TAX1749 | 50 |