

Life Settlements: Overview & Insights

Buckeye Life Resources | Continuing Education

BLR offers one hour of **CE*** in virtual or in-person format at no cost to you:

Purpose

To educate attendees about life settlements (i.e., the sale of in-force life insurance in the secondary market) in a pragmatic and forthright way.

Topics

The presentation addresses these and related questions:

- *How are life settlements relevant to your practice, and when should they be considered?*
- *What are the fundamentals of the transaction and industry?*
- *How might life settlements be another source of revenue for your organization?*
- *What are important considerations and best practices every policy owner / seller should know?*



Target Audience

The program is well-suited for the following practitioners:

- Financial advisors
- Estate planning attorneys
- Insurance specialists
- Charitable gift planners
- Trust administrators
- Private bankers
- Elder law attorneys
- CPAs

Please contact **Todd Everson** to schedule a presentation.



NAIFA Cleveland • Columbus Bar Association • Cleveland-Akron FSP
Cleveland Metropolitan Bar Association • NAIFA Cincinnati • North
Coast EPC • BSA Annual Estate Planning Seminar • Medina County EPC
Northern Ohio CGP • Various legal, financial & insurance organizations

* The presentation is already accredited by the Ohio Department of Insurance. It has also been approved by the Supreme Court of Ohio (SCO) for continuing legal education in the past, but the SCO will only authorize programs on a one-off basis *after* they have been scheduled. Similarly, the course has been approved for CFP, Accounting and CFRE credit.