STEVEN ANDREW JACKSON
Attorney and Counsellor at Law

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**Continuing Education Courses Presented by Steven Andrew Jackson, Esq.**
**Approved by the Insurance Department, NC General Insurance**

All courses are approved for General Credit with the NC DOI

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| **Title:** | **Digital Assets in Estate Planning, 1 hour**<br>**Course #C206035** |
| Description: | We will look at technology's impact on Estate Planning and Administration. How are LinkedIn, Facebook, Gmail, on-line banking and investment accounts and other on-line resources controlled after death? How are those on-line accounts handled by the Probate Court or the Trustee? |

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| **Title:** | **After Death Administration, 1 hour**<br>**Course # C202952** |
| Description: | We will look at your client's death: What do you do immediately? What if there is no Estate Plan? How does Probate Court work? How do we avoid Probate Court? What if the assets move by Death Beneficiary? Conflicts among the family? Trust Administration? Tax Planning? Can you Trust your Trust (Hidden Trustees)? Needed Accounting work? Retitling Accounts and Related topics. |

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| **Title:** | **Wills and Trusts 101, 1 hour**<br>**Course #C99035** |
| Description: | Examines what the basic differences are and how each works. |

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| **Title:** | **Retirement Planning & Estate Planning Issues, 1 hour**<br>**Course #C99037** |
| Description | Retirement plans require specific handling in Estate Planning. In this course we will review those issues and how they work. |

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| **Title:** | **Special Needs Trusts for Special People, 1 hour**<br>**Course #C99038** |
| Description | Challenged or handicapped individuals require special Estate Planning or you may disqualify them from their government benefits. |

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| **Title:** | **Probate Mistakes in North Carolina, 1 hour**<br>**Course #C99041** |
| Description | Common mistakes that delay and are costly in Probate Court. |

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| **Title:** | **Can You Trust your Trust?, 1 hour**<br>**Course #C202238** |
| Description: | We will look at how your client's Estate Plan could blow-up on them. |

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| **Title:** | **Mental Incapacity in Estate Planning?, 1 hour**<br>**Course #C202737** |
| Description: | We will look at legal options regarding Mental Incapacity and what can be done to provide the least wear and tear on our clients and their loved ones. |

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| **Title:** | **If I Should Die Before I Wake… 1 hour**<br>**Course #C204960** |
| Description: | We want to make sure your personal Estate Plan works.<br>My dad use to say "None of us are getting out of here alive anyway". When your time is up, will our Estate Plan work as you intended? Will the people you have chosen have legal authority to help if you are sick? Will what you own go to your loved ones as intended? As a professional have you outsmarted yourself in creating an ineffective Estate Plan? |

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| **Title:** | **Family Conflict in Estate Planning, 1 hour**<br>**Course #C207112** |

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| Description: | The last thing a person wants to do when they pass on is create conflict for their loved ones. Often they do so by poor Estate Planning, or it is inevitable. Conflict can be avoided or limited by good Estate Planning. What creates conflict in poor Estate Planning? How to identify potential areas of conflict. How to Estate Plan around family conflict areas. |
| **Title:** | **Overlooked Uses of Life Insurance, 1 hour**<br>**Course #C99036** |
| Description: | Review of the many uses of Life Insurance in life, financial planning, and estate planning. |

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| **Title:** | **Grandparent Planning Pitfalls, 1 hour**<br>**Course #C99040** |
| Description | Generation skipping taxes, special needs planning, and other issues that apply to grandparents' Estate Planning are reviewed. |

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| **Title:** | **Probate Mistakes in North Carolina, 1 hour**<br>**Course #C99041** |
| Description | Common mistakes that delay and are costly in Probate Court. |

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| **Title:** | **The 10 Most Common Estate Planning Mistakes Single People Make**<br>**1 hour**<br>**Course #C99042** |
| Description | Common mistakes single people make in Estate Planning. |

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| **Title:** | **Advisor Business from Estate Planning**<br>**Where is the Sale? 1 hour**<br>aka: What's In It For Me?<br>**Course #C04145** |
| Description | Your client needs your help in the Estate Planning Process. We'll show you how you can help them, and yourself, from the Financial Advisors, Accountant's and Insurance Professionals point of view. |

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| Title: | **Beneficiary Designations – Life Insurance, 1 hour**<br>**Course #C04146** |
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| Description | These are regularly done incorrectly and can lead to very bad results. We will review better ways to handle them. |

| Title: | **Five Common Estate Planning Mistakes, 1 hour**<br>Aka Will Your Estate Plan Work?<br>**Course #C04332** |
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| Description | We quickly review where most people are exposed if they are in a lawsuit and how to protect them. |

| Title: | **5 Common Asset Protection Mistakes, 1 hour**<br>aka Are You Protected From a Lawsuit?<br>**Course #C04333** |
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| Description | We quickly review where most people are exposed if they are in a lawsuit and how to protect them. |

| Title: | **More on Mental Incapacity, 1 hour**<br>**Course #C204485** |
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| Description: | We will show how the Legal Estate Planning intermixes with the tax related work of the Accountant, the investments with the Financial Advisor, the insurance with Insurance Professional, and the care planning for Eder Care Professionals. |

| Title: | **More After Death Administration, 1 hour**<br>More From Beyond the Grave<br>**Course #C203715** |
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| Description: | We are going to slow it down and be very specific as to what actions need to be taken in regards to what Assets, Tax Returns, and numerous other actions that need to happen after our client passes on. |

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| **Title:** | **Estate Planning for Business Owners, 1 hour**<br>**Course #C204634** |
| Description: | We will look at the unique situations involving Business Owners from their emotional and family issues, to the legal structure of the business, to the valuation of the business and how to transfer it when the Business Owner wants to transfer it, or it has to be transferred due to Mental Disability or Death. This is definitely something that your Business Owner clients need to prepare for, and it would be best if you could help counsel them in the actions that need to be taken |

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| **Title:** | **American Taxpayer Relief Act of 2012, 1 hour**<br>The Fallout from the Fiscal Cliff is The American Taxpayer Relief Act of 2012<br>**Course #C10820** |
| Description: | Overview of Tax Act; Income Tax Changes; Phase outs from Itemized Deduction; Medicaid Surtax; IRA Transfers to Charity; Gift and Estate Taxes; Other Insights |

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| **Title:** | **Improving Your Business Through Estate Planning, 3 hours**<br>**Course #C04142** |
| Description: | We all hear that clients need to do Estate Planning, but how do we make sure it is well done and how can it help your business? We'll show you how you can use it to build your business, reinforce your relationship with your clients, bring you more clients, and make you more profitable. |

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| **Title:** | **Maximizing Your Retirement Plans, 3 hours**<br>**Course #C04141** |
| Description: | We show you how we can stretch out your retirement plan to avoid taxes and how to protect it from divorce, lawsuit, and squander for you and your loved ones. |

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| **Title:** | **Estate Planning That Works, Part 1, 6 hours & Part 2, 6 hours = 12 hours**<br>**Course #C04143 and C04144** |

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| Description: | A two day course that comprehensively shows you how Estate Planning works for your clients, how it interacts with your work, and how you can increase your business with better clients, more clients, and more revenue. |

| **Title:** | **The Truth About Estate Planning, 3 hours**<br>**Course #C04146** |
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| Description | Many Estate Plans fail to meet your and your clients' goals. We show you how to avoid that and have Estate Plans that do meet the needs and goals of your clients and you. |

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