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FINANCIAL SERVICES LTD.

# Advocis National: A Deeper Dive into Philanthropic Strategies

Submitted by Rica Zara on September 20, 2022 - 4:23pm



# A Deeper Dive into Philanthropic Strategies

Join us on **Thursday, September 23, 2021, 12:00 PM - 1:00 PM (Eastern Daylight Time)**

Available spots are limited and will be on a first-come, first-served basis.

- This event has been approved for CE credits with The Institute, AIC, ICM, IC

**REGISTER NOW**

## Admission: Presenter:

As a benefit of membership, Advocis Members are able to attend this event at a discounted rate. Please use your **Advocis ID** as the

## Questions:

Mark Halpern, **CFP, TEP, MFA-P**  
Mark Halpern, **Certified Financial Planner (CFP), Trust and Estate Practitioner (TEP), Master Financial Advisor - Philanthropy (MFA-P)** has helped

- **Member Admission: \$175 + HST**
- **Non-member Admission: \$225 + HST**

As CEO of WEALTHinsurance.com®, Mark and his team specialize in tax advantaged insurance solutions to protect families, create charitable legacies, and preserve estates.

Source: <https://www.wealthinsurance.com/advocis-2021-09-23-12-00-13-00-philanthropic-strategies>

Mark works closely with clients' accountants, lawyers, insurance and investment professionals to provide comprehensive estate planning solutions as part of the team. [...] [Read More Here](#)