



National Association of Estate Planners & Councils

1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

General Course Certificate of Completion

Attendee Name: _____

Program Title: Collaboration Matters: Working Together to Produce Extraordinary Results

Delivery Method: Webinar – Live Delivery

Instructor(s): Albert E. Gibbons, CLU®, ChFC®, AEP® (Distinguished)

Program Desc: When professionals operate in silos, the quality of advice and planning is subpar. As tax laws remain uncertain, planning has become more complicated, solutions more complex, and as the marketplace grows more advanced, the call for a SuperAdvisor (team of experts) for the SuperClient seems essential and irreversible. A team of experts provides checks and balances due to the overlapping knowledge of the participants, accepts 100% responsibility for the well-being of the client, and tenaciously makes sure there is flawless implementation of their recommendations.

Attend this all-level presentation to gather an understanding of how best to work in a team environment and to learn strategies to take these tips back to your own practice.

Albert E. Gibbons, CLU®, ChFC®, AEP® (Distinguished) specializes in estate planning and life insurance for high net worth individuals, high-level corporate executives, and successful entrepreneurs. He works closely with professional tax advisors (attorneys, accountants, and trust officers) designing and implementing sophisticated life insurance strategies to help solve their clients' unique estate planning needs. Mr. Gibbons, a long-standing Accredited Estate Planner® designee, was inducted into the NAEPC Estate Planning Hall of Fame® in 2013.

Sponsor: National Association of Estate Planners & Councils

Program Date: Live Program Held May 13, 2020

Date Viewed: _____

Location: Webinar Delivery

Instruction Minutes: 60

Eleanor M. Spuhler, Administrator
Authorized Provider Official

The Association of Choice for Estate Planning Professionals