

ATTORNEY HOLBORN PRESENTED AT FPA FINANCIAL PLANNING SYMPOSIUM

Attorney Carl Holborn presented at the Financial Planning Association of Southern Wisconsin symposium titled "Planning for Change: Putting the Right Pieces Together" at the Country Springs Hotel & Conference Center in Pewaukee on October 27, 2011.

Attorney Holborn discussed the importance of tax returns as a source document in the financial planning process. Two tax returns were used as case examples and were analyzed and dissected to find planning opportunities for a financial planner. He also reviewed other financial planning topics which included maximizing benefits of Capital Gain/Loss transactions, minimizing Alternative Minimum Tax, benefits of paying off a mortgage, considering pre-tax opportunities, IRA planning, using income properties for your benefit, identifying municipal bond needs, funding educational costs, benefits of tax sensitive dividends and minimizing tax costs.

The mission of The Financial Planning Association of Southern Wisconsin is to promote the financial planning process and advance the financial planning profession in accordance with the highest ethical standards by providing education, association, and leadership for the financial services community and the public it serves.