



APPROVED  
CONTINUING EDUCATION  
PROVIDER



**Speaker:** *Fred Wollman, CFP® MPAS® AIF®*

**Topic:** Retirement. What is the story you keep telling yourself about money? What is the story you keep telling yourself about money? Does your story align with your personal reality? When is saving for your kid's college is a bad idea? And more.

**IRS#** M1NUJ-U-00066-18-1

**CTEC: #** TBA

**1 hour:** Tax Update

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**December 12, 2018 Dinner meeting, Registration at 5:00 p.m., dinner at 5:30, speaker at 6:30**  
**ALL Dinner Reservations must be paid by the Friday prior to the meeting.**

**Cost:** \$35 for members, \$45 non-members and \$50 at the door

**Location:** Handlery Hotel, 950 Hotel Circle North, San Diego, CA 92108

Applicant Name: \_\_\_\_\_

Enter License# CTEC \_\_\_\_\_ CPA \_\_\_\_\_ EA \_\_\_\_\_ PTIN# \_\_\_\_\_

Email address: \_\_\_\_\_

**Payment information for Credit Card:**

**Billing Name:** \_\_\_\_\_

**Billing Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip Code:** \_\_\_\_\_

**Telephone Number:** \_\_\_\_\_

**Type of Card:** Amex: \_\_\_\_\_ Discover: \_\_\_\_\_ MasterCard: \_\_\_\_\_ Visa: \_\_\_\_\_

**Credit Card Account Number:** \_\_\_\_\_

**Security code:** \_\_\_\_\_ **Expiration Date:** \_\_\_\_\_

**Amount Paid:** \_\_\_\_\_ **Check#** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Please complete this form and email or fax it to Rose Carter**

<mailto:rose.carter@sctaxpro.org>

**Information must be sent two days prior to the event. After the two-day deadline, please print a copy and bring it on the day of the event. You will need this upon registration.**

**Southern California Tax Professional, Inc.**

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