



AMERICAN ASSOCIATION of DAILY MONEY MANAGERS

Recordkeeping of Client Information

Tuesday, June 20, 2017 at 7 p.m. Eastern (6 p.m. Central, 5 p.m. Mountain, 4 p.m. Pacific)

Registration Ends June 13.

*1 Credit hour to Payroll, Finance, Bookkeeping and Bill Pay for PDMM® recertification.

This webinar will explore opportunities on how to better serve clients with note taking and record organization skills. We will review the value of record-keeping, for both the client and money manager, and consider future situations that prove the importance of that documentation.

Participants will gain insights on how good record keeping practices can benefit clients and their families, from historical meeting notes to client document storage. They will also learn common estate planning terminology to help identify legal documents.

This webinar is designed for any daily money manager interested in exploring benefits of good recordkeeping for themselves and for clients and their families.

Presenter: Jennifer R. Luitjens, Esq., Partner, Jarrett & Luitjens, PLC

Jennifer R. Luitjens is certified as an Elder Law Attorney (CELA) by the National Elder Law Foundation (NELF), a non-profit organization accredited by the American Bar Association. Practicing exclusively in the field of estate planning and elder law since receiving her *juris doctor* degree from Boston College Law School in 1996, she became associated with the Jarrett Law Office in 2008 and is now a partner at Jarrett & Luitjens, PLC. Jennifer has served on the Board of Directors and was Treasurer of the National Elder Law Foundation (NELF), the organization which certifies elder law attorneys and is dedicated to the development and improvement of the professional competence of lawyers in the area of elder law. She has presented to other estate and elder law attorneys in continuing education forums as well as offered educational opportunities to the public through spoken presentations and published newspaper articles.

Registration: The deadline to register is June 13. Register online or complete the PDF registration form and mail, email or fax to: AADMM Registration Office, 174 Crestview Drive, Bellefonte, PA 16823, Email: registration@aadmm.com, Fax: 814-355-2452.

Note: Registration is for one entrant. Any other individuals who would like to join this session are required to complete their own registration forms. The registration fee is set per person, not per connection.

Confirmation: Registrants will be notified on how to participate in a follow up email.

AADMM Webinar Registration

Recordkeeping of Client Information

Tuesday, June 20, 2017

7:00 p.m. Eastern

(6:00 p.m. Central, 5:00 p.m. Mountain, 4:00 p.m. Pacific)

Yes, I am registering for: *Recordkeeping of Client Information*

REGISTRATION DEADLINE is June 13, 2017

Fees:

NO REFUNDS will be made for cancellations after the registration deadline.

PDMM rate at \$50 \$ _____

AADMM member at \$65 \$ _____

Non-member at \$85 \$ _____

Total amount of payment \$ _____

Note: Those who attended and received CEU credits for this session at the 2016 Annual Conference are not eligible to receive credits from this webinar. Registration is for one entrant. Any other individuals who would like to join this session are required to complete their own registration forms. The registration fee is set per person, not per connection. This also applies to CEU credits (if offered). Only registered individuals will receive the CEU credit available with this webinar.

Please email me a receipt for my records

AADMM's Federal ID #: 52-1944683

Allow 7-10 business days to process payment.

Credit Card information:

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Name on card (Please print)

Account number

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3 digit security code

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Information for Registrant

Name

Title or Position

Business name

Mailing address

City State Zip

Daytime phone

Daytime fax

Email

Web Address

(confirmations will only be sent by email)

To MAIL payment, send completed registration form with check or money order payable to AADMM:

AADMM Registration Office
174 Crestview Drive
Bellefonte, PA 16823
Phone: 814-357-9191

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