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Rick Kravitz
V.P. Managing Director, Reference Division
The National Underwriter Company

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- Tools & Techniques of Estate Planning
- Tools & Techniques of Income Tax Planning
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EMPLOYEE BENEFIT AND RETIREMENT PLANNING

Leimberg | McFadden

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Product # 2710012 • ISBN: 978-1-936362-19-6 • 12th Edition
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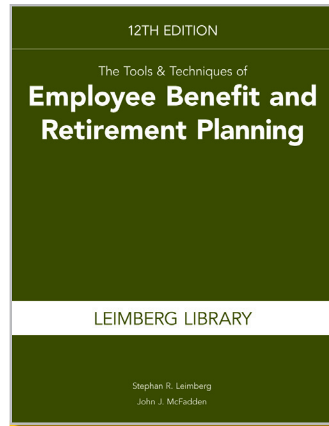

New 12th Edition!

In addition to providing clear and practical guidance on key questions, The Tools and Techniques of Employee Benefit and Retirement Planning has been fully updated to include completely current numbers:

- All salary limitations are updated to 2011 numbers
- Deduction limits for defined benefit plans have been fully clarified
- Estate tax coverage is completely current for 2011
- Roth IRA limitations are updated to reflect all recent changes
- Money purchase pension plan analysis has been updated to reflect retirement in a down economy, as well as the trend for less rapid increases in long-service rank-and-file salaries

ESTATE PLANNING

Leimberg | Kandell | Miller | Polacek | Rosenbloom | Levy | Kasner

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Product # 2850015 • ISBN: 978-1-936362-25-7 • 15th Edition
Format: Paperback • Pub. Date: June 2011 • Page Count: 716
Retail Price: $125.00
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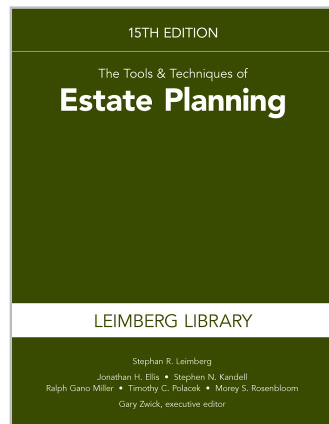

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This edition of The Tools & Techniques of Estate Planning, the most complete and up-to-date analytical estate planning publication, provides:

- Comprehensive coverage of more than 50 estate planning tools and techniques
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- Full coverage of tax implications
- Tips on "translating" complex recommendations into terms clients can understand.
- Full coverage of taxes affecting trusts and estates
- Numerous estate-planning aids—with exclusive data-gathering forms!
- A valuable Q&A supplement covering the Tax Relief Act of 2010 in detail

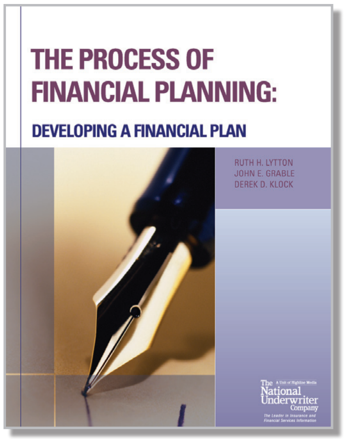
ABOUT SOME OF THE DISTINGUISHED AUTHORS:

» STEPHAN R. LEIMBERG is CEO of Leimberg and LeClair, Inc., an estate and financial planning software company; and CEO of LISI, Leimberg Information Services, Inc., a provider of e-mail/internet news and commentary for professionals on recent cases, rulings, and legislation. Mr. Leimberg is the author of numerous books on estate, financial, and employee benefit and retirement planning and a nationally known speaker. Leimberg is the creator and/or principal author of the entire nine book *Tools & Techniques* series.

» JOHN J. MCFADDEN is a tax and pension lawyer and consultant practicing in Philadelphia, PA. Mr. McFadden is the author of articles in tax and professional journals on such subjects as professional corporations, insured pension plans, retirement plan distributions, and nonqualified deferred compensation. Mr. McFadden also speaks and consults on tax and compensation planning matters and conducts seminars for financial planners.

2012 REQUIREMENT CASE/PROCESS

In January 2012, a new requirement, the Financial Plan Development Course, becomes reality. This comprehensive new course requires maximum focus across the entire spectrum of financial planning. Two books, written by respected academics, are specifically designed to give faculty the tools to create and successfully manage this new course, including background and framework, topical reviews, a wide variety of cases, "how-to's" on research and analyses, and an emphasis on ethical considerations and communications.

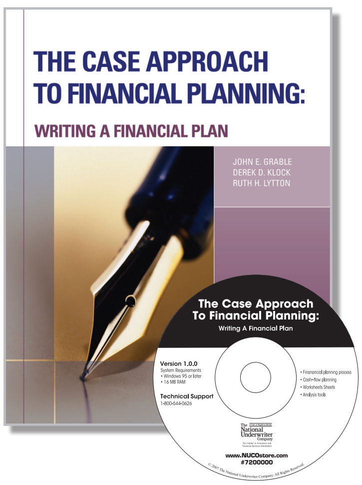


THE PROCESS OF FINANCIAL PLANNING

Lytton | Grable | Klock

Product # 7190000 • ISBN: 978-0-87218-692-X
Format: Paperback • Pub. Date: 2006 • 1st Edition
Page Count: 356
Retail Price: $77.99
See page 11 for student and bookstore discount pricing

The first and only publication of its kind, this text provides a systematic process that provides the framework for the practice of financial planning. It discusses concepts central to everyday practice: the ethical, legal and regulatory environment, planner-client communication, and planner-client decision making. Finally, it explains the components of a model financial plan to document and guide the process for the planner and client. In effect, this guide bridges the path from student to working professional.



THE CASE APPROACH TO FINANCIAL PLANNING

Grable | Klock | Lytton

Product # 7200000K • ISBN: 978-0-87218-669-9
Format: Paperback, CD • Pub. Date: 2008 • 1st Edition
Page Count: 600
Retail Price: $125.00
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This unique companion to *The Process of Financial Planning* explains and fosters sound planning logic and decision-making strategies using the case study approach. Beginning with an overview of the financial planning process and covering financial computations, cash-flow planning, and analysis tools, this resource provides students with a real-world demonstration of how a financial planner works.

A top-notch team of authors from leading CFP® programs present the planning process in a cohesive format that fills the void in most CFP® curricula. By incorporating case study analysis and reviews of the major CFP® topic areas, students learn how to utilize data, analyze results, and present a proposed plan that will achieve clients' goals.

- Present useful calculation and analysis tools – sample forms, questionnaires, and worksheets
- Offer core planning topic–specific chapters with planning strategies, advantages and disadvantages, and application to case studies
- Short, quantitative and analytical problems, and several mini-cases
- Analyze a running case throughout the entire text

The text is supplemented with a CD-ROM featuring the Financial Facilitator spreadsheet.

THE COMPREHENSIVE FINANCIAL PLANNING BUNDLE

The Process of Financial Planning & *The Case Approach to Financial Planning*

Together, these texts offer students the benefit of discovering the practical processes of building a financial planning practice with a real-word demonstration of these concepts in practice; resulting in an individual thoroughly prepared to make the transition into the professional financial planning arena.

Bundle Product #2320000K • Retail Price: **$158.99**
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FINANCIAL PLANNING

Leimberg | Satinsky | Doyle, Jr. | Jackson

AVAILABLE IN PRINT OR ONLINE!

Product # 2770009 • ISBN: 978-0-87218-989-8 • 9th Edition
Format: Paperback • Pub. Date: 2009 • Page Count: 514
Retail Price: $125.00
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Reinforce the systematic approach your students need to clearly define and build upon the principles of Financial Planning as outlined in the CFP® Certification Examination Topics List.

Teach your students to craft the ultimate financial plans with:

- Emphasis on cash flow management within personal financial planning
- Entire chapters devoted to an in-depth review of all major financial planning areas:
  - Investments
  - Insurance
  - Employee benefits planning
  - Estate planning
  - Retirement planning
  - Charitable planning
  - Income tax
  - Risk management

The edition offers coverage on:

- The impact of the market downturn on financial planning and how it has changed.
- Discussion of deductible losses from Traditional and Roth IRAs, Section 529 Plans, and ESAs.
- Tax-favored funding provisions, grants, loans, expected family contributions, and other college amounts updated.

INCOME TAX PLANNING

Leimburg | Satinsky | Jackson | Gardner | King | Stenken | Fenton

AVAILABLE IN PRINT OR ONLINE!

Product # 2740003 • ISBN: 978-0-87218-986-7 • 3rd Edition
Format: Paperback • Pub. Date: 2008 • Page Count: 314
Retail Price: $125.00
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Complex tax rules written in every-day language meet the needs of experienced practitioners and students alike.

Expertise for successful income tax planning includes:

- Deductions
- Tax compliance
- Accounting methods
- Conversion of income
- Stock option planning
- Charitable planning

This edition includes:

- 2009 Stimulus Package
- Charitable property donations
- IRA charitable rollovers
- Changes in capital gains tax

INVESTMENT PLANNING

Leimberg | LeClair | Doyle | Robinson

AVAILABLE IN PRINT OR ONLINE!

Product # 2730002 • ISBN: 0-87218-689-X • 2nd Edition
Format: Paperback • Pub. Date: 2006 • Page Count: 562
Retail Price: $125.00
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Students gain a thorough study of important investment instruments.

Equip students to pull together the important concepts of:

- Investment risk
- Performance measurement
- Fundamental and technical analysis
- Asset valuation
- Modern portfolio theory
- Hedging and option strategies
- Emphasis on client-based objectives

LIFE INSURANCE PLANNING

Leimburg | Doyle

AVAILABLE IN PRINT OR ONLINE!

Product # 2700004 • ISBN: 978-0-87218-933-1 • 4th Edition
Format: Paperback • Pub. Date: 2007 • Page Count: 602
Retail Price: $125.00
See page 11 for student and bookstore discount pricing

This text explores all aspects of life insurance planning to enable your students to make the best life insurance decisions for their future clients. Students will gain targeted information, succinct explanations, alternative strategies, and quick comparisons of more than 10 different types of life insurance policies.

This resource features coverage and examination of some:

- Income and transfer tax consequences of life insurance
- Buy-sell agreements
- Life insurance trusts and life insurance in qualified plans
- Charitable planning
- Variable annuities vs. mutual funds
- Qualified/nonqualified plans
- Split dollar regulations for old and new arrangements

Students will benefit from the unique charts, checklists, and real-world examples included in this text that help them to immediately apply skills.

RISK MANAGEMENT FOR FINANCIAL PLANNERS

Barlow | Chandler | Maheu | Maloney | Massmann | Reitz | Thamann

AVAILABLE IN PRINT OR ONLINE!

Product # 8070002 • ISBN: 978-0-87218-934-8 • 2nd Edition
Format: Paperback • Pub. Date: 2007 • **Page Count: 258**
Retail Price: $56.99
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Used with Life Insurance Planning, this text offers students complete coverage of risk management and insurance—from health, disability, and long-term care insurance to property & casualty insurance for individuals and businesses.

Chapters hone skills/strategies towards:

- Insurance company and policy selection
- Overviews of business liability and health-related insurance
- End of Chapter questions to reinforce key concepts
- Glossary of key risk management terms

Features new discussions of business overhead insurance, workers compensation, employer's liability, and commercial liability insurance. *Risk Management for Financial Planners* focuses on the fundamentals of risk management—protecting the client during wealth accumlation and disbursement. Expanded coverage of risk and insurance topics throughout will enrich the relevancy of this text.

Complete Life Insurance & Risk Management Coverage

When partnered together, *Tools & Techniques of Life Insurance Planning* and *Tools & Techniques of Risk Management for Financial Planners* achieve 100% correlation with the CFP® Certification Examination Topics List for Insurance and Risk Management.

BUNDLE OF 2: Life Insurance Planning + Risk Management for Financial Planners
Product # 8080002 • Retail Price: $139.99
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CHARITABLE PLANNING

Leimberg | Allen | Hays | McNab | Shumaker | Yang | Zipse

AVAILABLE IN PRINT OR ONLINE!

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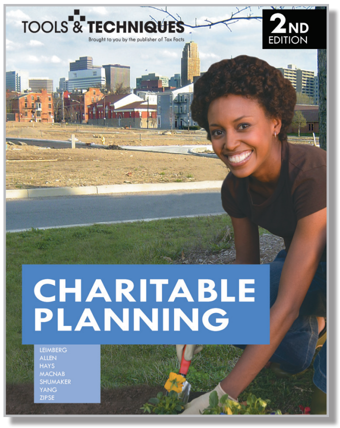

Enable your students to reap the rewards of the lucrative charitable planning market. Numerous charts, graphs, and tables explain everything from the basic charitable deduction rules to the most complex charitable giving techniques.

Complete with the broadest coverage of charitable giving vehicles & techniques, this title covers:

- Income rules and limits in easy-to-understand language
- Emphasis on critical valuation uses and potential ethical pitfalls
- Private vs. community foundations
- Charitable annuities, trusts, funds, and life insurance

PRACTICE MANAGEMENT

Bruckenstein | Drucker | Leimberg

Product # 2690000 • ISBN: 0-87218-653-9 • 1st Edition
Format: Paperback • Pub. Date: 2004 • Page Count: 302
Retail Price: $125.00
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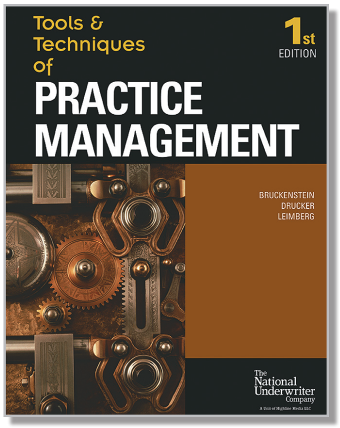

In today's increasingly competitive marketplace, students must hone their practice management skills to survive and prosper.

Work through a wide variety of practice management decisions:

- Selecting a business model
- Setting a competitive fee structure
- Advantages and disadvantages of owning one's own practice
- The nitty-gritty basics of software, hardware and other management tools
- And ultimately selling a practice

RISK MANAGEMENT & INSURANCE

Leimberg | Riggin | Howard | Kallman | Schmidt

AVAILABLE IN PRINT OR ONLINE!

Product # 2960000 • ISBN: 0-87218-701-2 • 1st Edition
Format: Paperback • Pub. Date: 2002 • Page Count: 588
Retail Price: $125.00
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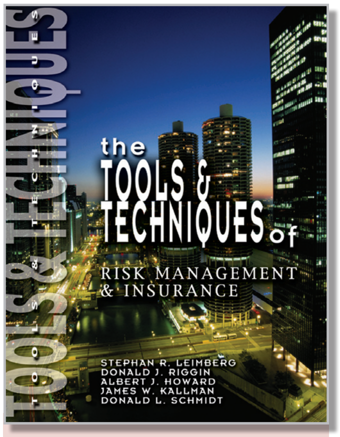
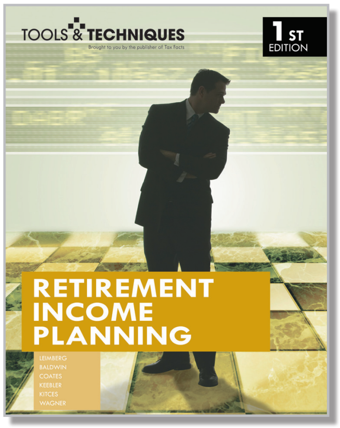


2008-2009 Supplement updates the text and offers expanded discussions and two detailed case studies

This guide shows students how to identify and quantify a multitude of risks and then various tools and techniques that will eliminate, reduce, or shift the potential use of loss that risk represents.

Comprehensive coverage consists of:

- Enterprise & traditional risk management
- Loss control & claims management
- Alternative risk & contractual transfer
- Disaster planning
- Global exposures
- Broker & vendor relationships



RETIREMENT INCOME PLANNING

Leimberg | Baldwin | Coates | Keebler | Kitces | Wagner

AVAILABLE IN PRINT OR ONLINE!

Product # 2680000 • ISBN: 978-0-87218-922-5 • 1st Edition
Format: Paperback • Pub. Date: 2007 • Page Count: 273
Retail Price: $125.00
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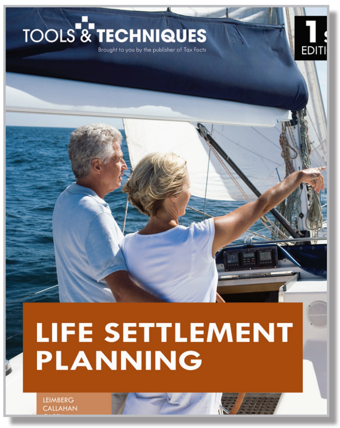
Every student should be prepared to address the emerging need for retirement income planning that satisfies perceived and actual client security.

Once a client has accumulated wealth for retirement, students must understand what's next:

- Income Risk Management—withdrawals, allocation & modeling
- Insured Solutions—annuities, life insurance & living benefits
- Tax Considerations—vehicles, planning, rollovers & distributions
- Investment Strategies—bonds, reverse mortgages, & combination investments

Retirement Income Planning shows students how to bridge the gap between wealth preservation and the strategies for extended income needs during retirement.



LIFE SETTLEMENT PLANNING

Leimberg I Callahan I Casey I Magner I Reed I Rybka I Siegert

Product # 2630000 • ISBN: 978-0-87218-968-3 • 1st Edition
Format: Paperback • Pub. Date: 2008 • Page Count: 507
Retail Price: $125.00
See page 11 for student and bookstore discount pricing

Packed with information and tools and principles that can be applied systematically, Life Settlement Planning will prepare any financial student for professional success in this growing market.

Life Settlement Planning includes:

- Step-by-step Life Settlement Evaluation Guides
- Practice and planning pointers
- Frequently asked questions
- Case studies
- Practice management tips
- Q&A to answer hard-hitting issues

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- Retirement Income Planning
  12-Month Subscription **$125.00**
- Risk Management for Financial Planners
  12-Month Subscription **$56.99**

The Indispensable Tax Reference Guides Every Financial Student Needs

2011 TAX FACTS ON INSURANCE & EMPLOYEE BENEFITS

Steven A. Meyerowitz, Esq. Executive Editor

Product # 2920011
Format: Paperback
Published: November 2010
• ISBN: 978-1-936362-12-7
• Retail: $86.00
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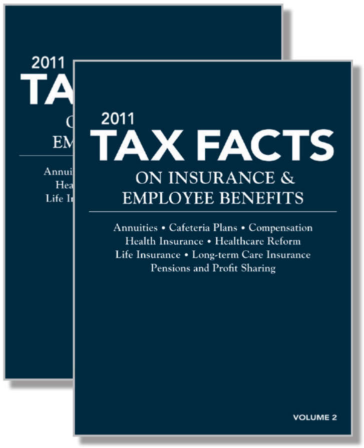

Gain answers to targeted tax questions asked by financial advisors and clients alike. Includes:

- Annuities
- Cafeteria Plans
- Compensation
- Health Insurance
- Pensions & Profit Sharing

Updated for 2011 with the Tax Relief Act of 2010; the Pension Relief Act of 2010; the Patient Protection and Affordable Care Act; the Dodd-Frank Wall Street and Consumer Protection Act of 2010 and much more.

FIELD GUIDE TO ESTATE PLANNING, BUSINESS PLANNING & EMPLOYEE BENEFITS

Donald F. Cady, J.D., LL.M, CLU

Product # 1790011
Format: Paperback
Published: March 2011
• ISBN: 978-1-936362-16-5
• Retail: $86.00
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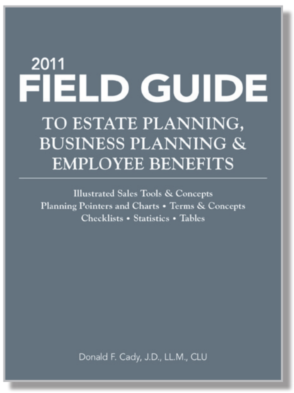


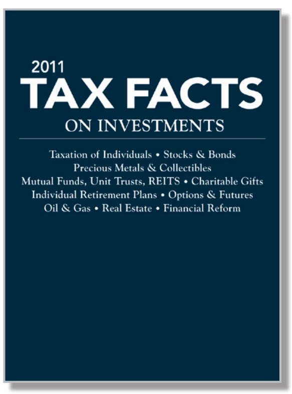
The first practical resource covering the estate planning implications of the Tax Relief Act of 2010 for advisors and their clients. Includes numerous illustrations, charts, and tables.

Updated for 2011 with the impact of the Patient Protection and Affordable Care Act on self-insured health reimbursement arrangements; full coverage of new terms and concepts: "Portability" and "SIMPLE Cafeteria Plans"; updated retirement plan contribution limitations; current facts about the cost of raising a child, the cost of college, and much more.

2011 TAX FACTS ON INVESTMENTS

Steven A. Meyerowitz, Esq. Executive Editor

Product # 2930011
Format: Paperback
Published: November 2010
• ISBN: 978-1-936362-14-1
• Retail: $86.00
See page 11 for student and bookstore discount pricing



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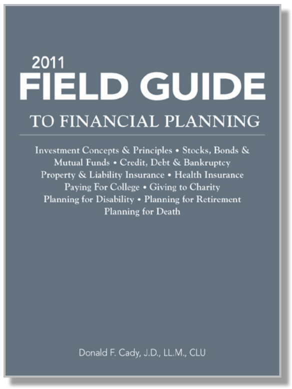
- Stocks & Bonds
- Options & Futures
- Precious Metals & Collectibles
- Individual Retirement Plans

Updated for 2011 with the Tax Relief Act of 2010; the effects of the Dodd-Frank Wall Street and Consumer Protection Act on investor protection and securities regulation; analysis of the Pension Relief Act of 2010; the Patient Protection and Affordable Care Act and much more!



2011 FIELD GUIDE TO FINANCIAL PLANNING

Donald F. Cady, J.D., LL.M, CLU

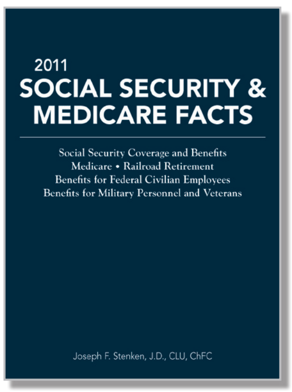
Product # 1780011 • ISBN: 978-1-936362-17-2
Format: Paperback • Retail: $86.00
Published: March 2011
See page 11 for student and bookstore discount pricing

Includes current financial planning strategies and concepts, depicted through numerous illustrations, charts, and tables.

The following topics are covered:

- Stocks, Bonds, & Mutual Funds
- Credit, Debt & Bankruptcy
- Property & Liability Insurance
- Health Insurance
- Paying for College
- Giving to Charity
- Planning for Disability
- Planning for Retirement
- Planning for Death

Updated for 2011 with advice on all aspects of education – how to finance retirement, and buying a home.



2011 SOCIAL SECURITY & MEDICARE FACTS

Joseph F. Stenken, J.D., CLU, ChFC

Product # 3160011 • ISBN: 978-1-936362-18-9
Format: Paperback • Retail: $79.00
Published: April 2011
See page 11 for student and bookstore discount pricing

The 2011 edition combines – and enhances the valuable material previously found in Social Security Source Book and All About Medicare.

This highly useful resource includes:

- Hospital Insurance
- Medical Insurance
- Prescription Drug Insurance
- Social Security Coverage and Benefits
- Benefits for Federal Civilian Employees
- Benefits for Military Personnel & Veterans

Updated for 2011 with special needs trusts; spousal improverishment; the interplay between annuities and Medicaid eligibility; Medicaid planning between spouses; and retirement, survivor, and disability benefits.

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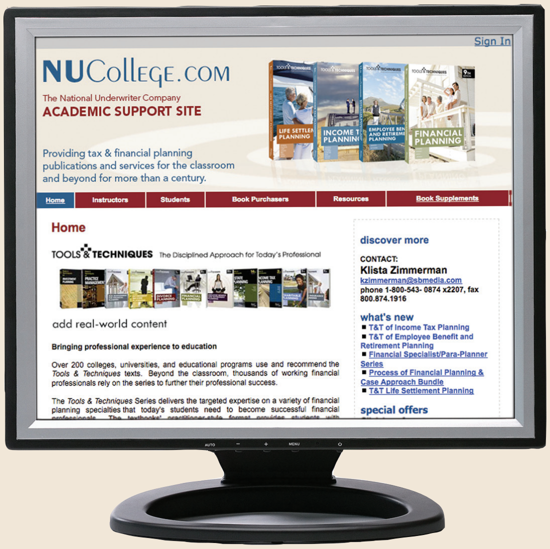

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