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FINANCIAL SERVICES LTD.

JOIN US! Advocis Presents ?Coffee Talks?

Submitted by Rica Zara on September 29, 2022 - 4:28pm



Advocis Presents:

2022 Series - Episode ten: Collateral Loans ? Corporate vs. Shareholder Borrowing

A Coffee Talk Webinar

Leveraging a corporate-owned policy in the future is a common financial strategy to access policy cash values on a tax efficient basis for retirement or other purposes. A question often asked is "should I borrow corporately or personally against the policy?"

This episode of Coffee Talks has been approved by The Institute for **0.5 CE credit**. Join us on **October 6th at 11:00 am EDT** for a Coffee Talk as Advocis welcomes **Nick Fabiano**, CPA, CA, TEP, Director, Tax & Estate Planning Group at Canada Life as he provides a brief overview of the benefits and

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