

Fall 2026 CPE - Registration Form

I would like to register for the following seminars:

Date	Location	Topic	IP	Zoom
September 29	Waltham / Zoom LVC	Understanding & Efficiently using Joint Revocable Trusts to Maximize MA \$2M Exemption for estates under \$15M **	☐	☐
October 22	Zoom LVC	Business Valuation in Practice		☐
October 27	Zoom LVC	Post-Mortem Tax Planning: A roadmap for Executors & Heirs		☐
October 29	Zoom LVC	Tax-Smart Savings Strategies: Trump accts, Roth Conversions & 529 Plans		☐
November 4	Zoom LVC	Choice of Entity & Conversation of Business Entities after the OBBBA		☐
November 10	Waltham / Zoom LVC	Intermediate and Advanced Estate Planning Techniques		☐

Registration Fees: **MAA Member:** \$185.00 (4 CPE) **Non-Member:** \$210.00 (4 CPE)

**** In Person 9.29 & 11.10 - Member:** \$225.00 advanced signup \$275.00 signup at event **Non-Member:** \$250.00 advanced signup \$300.00 signup at event

Total registration \$_____ check made payable to MAA is enclosed ☐ Please charge my credit card ☐

NAME_____ TELEPHONE #_____

CARD MAILING ADDRESS_____

ADDITIONAL PERSON(S) ATTENDING_____

☐  ☐  ☐  _____ Exp. Date Required ____/____

☐ Please send a confirmation by e-mail. My address is_____

 MAA, 300 Andover St Ste 334, Peabody, MA 01960  781.246.7788  781.246.7873  info@maacct.org

Name on Card_____

Signature: _____



CANCELLATION POLICY: Cancellations must be received three business days prior to the seminar for a full refund. Otherwise, there will be a charge of \$50.00 representing a cancellation fee. No refunds for no-show registrant or if electronic course materials have been acquired. Substitutions welcomed, notify MAA.

MAA is an approved provider of the Workforce Training Fund Express Program.

Register Today!

These courses qualify for reimbursement through the Massachusetts State Workforce Training Express Fund. You could get reimbursed the full cost of these courses. Firms/companies with 100 or fewer MA employees may receive 100% reimbursement. Firms/companies with more than 100 MA employees may receive 50% reimbursement.

You must register with MAA for the course(s) first. Then apply for reimbursement through the Workforce Training Express Fund website **3 weeks in advance of course date to be eligible**. The course code for each program is listed with the course description.

For eligibility requirements and to apply: [Express Program - Workforce Training Fund](#)