Jonathan Cohen COMPLETES
ADVANCED ESTATE PLANNING INSTITUTE PROGRAM

Jupiter, FL. – Jonathan Cohen, a Managing Director/ Branch Manager in the 1209 Main Street #116, Jupiter, FL 33458 office of Raymond James & Associates, Inc., member New York Stock Exchange/SIPC, recently completed the Advanced Estate Planning Institute, according to Patrick Daxon, Vice President of Raymond James' Wealth, Retirement & Portfolio Solutions group.

The Advanced Estate Planning Institute (AEPI) is a three-day program for financial advisors on developing strategies and recognizing opportunities within the estate planning, philanthropy and wealth management process and how to leverage this new knowledge to serve the needs of their clients. Among the topics covered are the changing federal estate tax* laws, strategies for high-net-worth families, long-term care alternatives, irrevocable trusts and charitable techniques.

"Through this program, our financial advisors gain a deeper and broader understanding of the estate planning process and strategies to facilitate the passing of wealth while potentially minimizing the impact of taxes for high-net-worth families," says Daxon.

The Raymond James Institute of Finance provides ongoing education and professional development for the firm's more than 6,000 financial advisors and their assistants. The institute's wide-ranging curriculum encompasses many technical disciplines in the financial services industry. It is designed to enable the financial advisor to recognize, quantify, illustrate and solve financial planning problems of clients and prospects and is a key to providing high quality advice and superior customer service.

**Please note, changes in tax laws or regulations may occur at any time and could substantially impact your situation. While our advisors are familiar with the tax provisions of the issues presented herein, they are not qualified to render advice on tax or legal matters. You should discuss any tax or legal matters with the appropriate professional.*

About Raymond James & Associates

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