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## Wealth Management

### Contributor's Corner

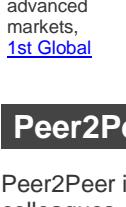


This AccountingWEB.com newsletter educates you on the ins and outs of life insurance within a qualified plan in *From the Wealth Management Academy*. A 1st Global advisor shares his story on why he became a financial planner in *Peer to Peer*. In *The Landscape*, 1st Global CEO and founder Tony Batman highlights eight risks that could affect your clients' retirement income.

### From The Wealth Management Academy

The 1st Global Wealth Management Academy offers three distinct educational platforms for tax-centric wealth management firms, each possessing its own advantages: classroom-based education, Web-based instruction and self-study. As part of 1st Global's commitment to progressive, ongoing education, the Wealth Management Academy provides the opportunity to attain the knowledge, skills and habits necessary to become a highly successful wealth management firm. From The Wealth Management Academy brings the academy to you in monthly installments.

### Strategies for Utilizing Permanent Life Insurance in Qualified Plans



One of the advantages offered by qualified retirement plans is the ability to acquire life insurance on plan participants using existing plan assets and future contributions to pay the premiums. This allows the plan to obtain life insurance coverage on plan participants with tax-deductible dollars.

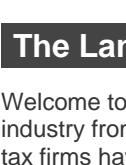
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Tim  
Mezhlumov,  
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### Peer2Peer

Peer2Peer is your source for case studies and best practices in wealth management coming directly from your colleagues. With experienced advice from your peers within the tax profession, you can glean business-building strategies and tactics to enhance the wealth management services your firm provides or seeks to embrace. Leverage the knowledge of industry leaders to carve your own path to success with Peer2Peer.

### The One Key to a Dignified Retirement? Starting Early



The role of a financial planner and particularly a financial planner in a CPA firm, is to educate our clients that retirement planning is not about market timing. It's not about investment returns. It's all about having a consistent plan and then sticking to that plan.

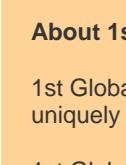
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David Shill,  
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### The Landscape

Welcome to The Landscape, a monthly feature article that provides insights into the wealth management industry from a tax-centric point of view. With the economic and tax landscapes constantly shifting, CPA and tax firms have a unique opportunity to change how their clients view and manage their economic futures more efficiently and effectively. Keeping an eye on The Landscape can help you navigate the road to wealth management success.

### Eight Major Risks to Your Clients' Retirement

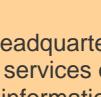


Everyone wants a safe, stable and certain flow of income to sustain their ideal retirement. But if you were to ask five different relatives and friends what retirement means to them, you would likely receive five different answers.

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Tony Batman,  
chairman and  
CEO,  
[1st Global](#)

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### About 1st Global

1st Global was founded in 1992 by CPAs who believe that accounting, tax and estate planning firms are uniquely qualified to provide comprehensive wealth management services to their clients.

1st Global provides CPA, tax and estate planning firms the education, technology, business-building framework and client solutions that make these firms leaders in their professions through dedicated professional client relationships built around wealth management.

More than 450 firms have chosen to affiliate with 1st Global, making us one of the largest financial services partners for the tax, accounting and legal professions.

1st Global Capital Corp. is a member of FINRA and SIPC and is headquartered at 12750 Merit Drive, Suite 1200 in Dallas, Texas, (214) 265-1201. Investment advisory services offered through 1st Global Advisors, Inc., an SEC-Registered Investment Adviser. Additional information about 1st Global is available via the Internet at [www.1stGlobal.com](http://www.1stGlobal.com)

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