June 10, 2025

Business Law for Small Business

Tanzania Cannon, Principal
General Counsel by Cannon
t.cannon@gcbycannon.com

Tanzi takes the practical experience she gleaned from working inside corporations and adapts it to her strategic approach to the practice of law and human resources and business support services. In this program she will share how her experience as a labor and employment litigator and business attorney, compliance officer, labor attorney and labor relations manager and human resources practitioner can help small businesses.

General Information

Each session qualifies for 3 hours of Continuing Professional Education credits. The sessions meet on Tuesdays from 3:00 until 6:00. The cost of attending all or any part of the seven-week series is $100.00.

Write check payable to: CPE Forum
Mail check: Josephine Sarnelli, CPA
14 Mill Street
Westfield, MA 01085
For questions contact:
Sarnelli@SarnelliCPA.com

About the CPE Forum

The CPE Forum was established in the Fall of 1980 by Josephine (Jo) Sarnelli, CPA. The Forum's mission is to provide high quality educational programs at a low cost to business professionals, including Certified Public Accountants and others seeking continuing professional educational (CPE) credits for licensing purposes. It is also open to the general community.

Online Learning

All sessions are conducted online with live streaming and interactive participation using the Zoom webinar application. You can join a session using a smart cellphone, tablet, computer, or laptop. If your computer does not have a microphone or speaker, you can use either your landline or cellphone in conjunction with your computer. A video camera is not required.

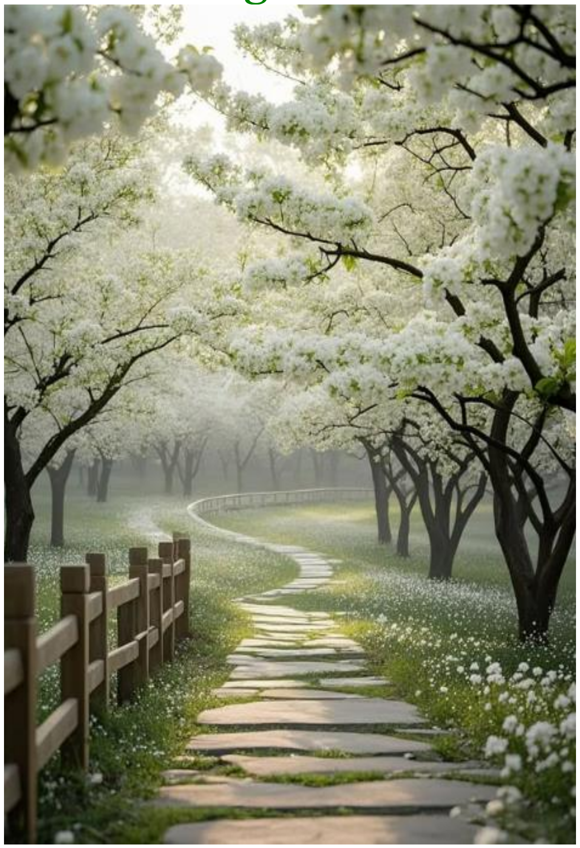
Register in advance for these webinars:
https://us02web.zoom.us/webinar/register/WN_1TXIfIrnS4emM-A4x_FFlA
After registering, you will receive a confirmation email with information about joining the webinars.

RETAIN THAT CONFIRMATION EMAIL. IT WILL HAVE THE SECURITY LINK TO ATTEND THE ENTIRE SERIES.

CPE Forum

Spring 2025

Online Educational Programs



Contact:
Josephine Sarnelli, CPA
(413) 746-9067
info@cpeForum.org
www.cpeForum.org

April 29, 2025

Medicare 101 – Understanding Your Medicare Options

Edward Spater, Licensed Agent
https://www.extraordinarybenefits.com/

Medicare can be complex and confusing. For so many people, it can be extremely intimidating just trying to understand all the available options out there. Plans can differ by price or benefits; they can even differ by where you live. Whether you are new to Medicare, retiring or are thinking about reconsidering your current plan, this presentation will afford you the opportunity to become more informed about your choices so that you can make decisions which are in your best financial interests.

May 6, 2025

How to Plan After the Election

Kevin D. Quinn, J.D., President
Legacy Counsellors, P.C.
kquinn@legacycounsellors.com

A new administration will almost certainly bring legislative changes that will affect almost every estate plan. This course will delve into the practical effects and solutions should the Tax Cuts & Jobs Act of 2017 cease, should it be extended, or should there be new and unique legislation involving estate taxes, capital gains taxes, and income taxes. This course will be intended to offer the participant practical solutions.

May 13, 2025

Evolving Landscape of Healthcare

Vinnie Daboul, Managing Director
Lynda Dowd, EB Practice Leader
RT Consulting, LLC
vinnie@rtconsultingllc.com
Lynda@rtconsultingllc.com

Healthcare is constantly changing and it proves to be challenging to both the consumer and employers. In this session we provide information about the market influences driving change, the impact of pharmaceutical innovation, explore the rise of consumer-directed accounts and analyze funding structures to include level-funding, self-funding and captives.

May 20, 2025

TD Wealth Market & Economic Update

Frank Levin
Vice President, Institutional Relationship Manager
TD Private Client Group
Frank.Levin@td.com

In this program, TD Wealth Management will provide a current economic and market update, along with possible investment strategies for the future. The speakers will also touch on the importance of business succession planning.

May 27, 2025

The Finances of Divorce

Attorney Julie Dialessi-Lafley
Bacon Wilson PC
JDialessi-Lafley@baconwilson.com

Attorney Julie Dialessi-Lafley will offer a discussion of financial considerations relative to divorce, including the formula for child support, alimony, and division of assets.

June 3, 2025

Elder Law Planning

Attorney Michele Feinstein
Attorney Stephen Sobey
Shatz, Schwartz and Fentin, P.C.
mfeinstein@ssfpc.com
ssobey@ssfpc.com

This program will address the importance of a well drafted general durable power of attorney when navigating various aspects of elder law planning. This will include advanced topics relating to changing dispositive plans and establishing further estate planning documents, managing complications with family dynamics, and undertaking strategies for asset protection. There will also be a discussion on current planning approaches for MassHealth long-term care in both short term (“crisis”) and longer-term time horizons.