

Registration Form

Due by Wednesday, May 24th

Fax or Email To:

Legacy Counsellors, P.C.
and the Wealth Strategies® Institute, LLC
FAX: (413) 529-8027, or call PHONE: (508) 595 8574
EMAIL: tbianchi@legacycounsellors.com

Registrant:

Name

Company/Title

Address

Last four #s of Social Security Number (**Required** for CFP CE)

CFP Board ID (**Required** for CFP CE)

Insurance License Number (**Required** for CT & MA Insurance CE)

Phone Number

E-Mail Address (All future communication will be via e-mail)

YES! I wish to attend on May 26th, 2023 at 9:00 AM through Zoom.

I wish to receive:

2 hrs. Mass. Insurance CE Credit.

2 hrs. Conn. Insurance CE Credit.

2 hrs. Conn. CLE Credit.

2 hrs. Accounting CE Credit.

2 hrs. CFP CE Credit.