



THE  
NORTHERN TRUST  
INSTITUTE

2025 WEALTH PLANNING SYMPOSIUM

# CONTINUING EDUCATION CREDIT GUIDE

# CONTINUING EDUCATION CREDIT

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The Northern Trust Institute's 2025 Wealth Planning Symposium offers continuing education credits. CLE, CFP, CIMA, CPWA and CPE for CPAs are offering up to **six continuing education credits**. CTFA is offering up to **7.5 continuing education credits**.

Continuing education credit will only be available for sessions attended in real time (not replay).

All attendees must attend each session for a minimum of 60 minutes and will need to scan the QR code on the console for each session to access the [ConferenceAdit platform](#). You will login using the email address you provided at registration and enter the code, **2025WPS**. You must check in and out with the provided four-digit PIN for all CE credit designations during each session. For CPE only, you must submit the one keyword provided by the presenter in the survey at the conclusion of each session. [Watch this instructional video to learn more.](#)

If you have any issues or questions accessing the ConferenceAdit platform please contact [info@conferenceadit.com](mailto:info@conferenceadit.com).

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## CLE

ConferenceAdit works to accommodate requests for CLE credit in all states. Attorneys may be eligible to receive CLE credit through reciprocity agreements or by self-submitting their attendance, depending on their state's rules.

### Attendee Reporting

After the meeting, all attorneys will receive a general CLE attendance certificate that includes formats for both 50-minute and 60-minute credit hour states.

To look up your state's Course ID:

1. Visit [tni.conferenceadit.com](https://tni.conferenceadit.com).
2. From the drop-down menu, select the appropriate Institute.
3. Enter the event password (provided after the meeting and located at the bottom of your CLE certificate).
4. Once logged in, select your state to view the Course ID for self-reporting.

If your Course ID is not yet available, you may enter your email address to receive a notification once it is posted. [For more information, please navigate to page 4.](#)

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## CIMA

Investments & Wealth Institute has accepted The Northern Trust Institute 2025 Wealth Planning Symposium for **6 hours of CE credit**.

### Attendee Reporting

ConferenceAdit will email Certificates of Completion if all requirements have been met. Attendees must then self-submit credit.

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## CPWA

Investments & Wealth Institute has accepted The Northern Trust Institute 2025 Wealth Planning Symposium for **6 hours of CE credit**.

### Attendee Reporting

ConferenceAdit will email Certificates of Completion if all requirements have been met. Attendees must then self-submit credit.

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## CFP

The Certified Financial Planner Board of Standards Inc. has accepted **6 credit hours** for The Northern Trust Institute 2024 Wealth Planning Symposium. Content Level: Intermediate.

### Attendee Reporting

Northern Trust will report CE credit hours to The Certified Financial Planner Board of Standards Inc. on behalf of the attendee. CFP will grant the credit(s) if all requirements have been met.

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## CTFA

American Bankers Association Professional Certifications has approved The Northern Trust Institute 2025 Wealth Planning Symposium for **6 CE credits**. ABA Professional Certifications is dedicated to promoting the highest standards of performance and ethics within the financial services industry. This statement is not an endorsement of this program or its sponsor.

### Attendee Reporting

ConferenceAdit will email Certificates of Completion if all requirements have been met. Attendees must then self-submit credit.

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## CPE

The Northern Trust Company is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](https://www.nasbaregistry.org).

[For more information, please navigate to page 3.](#)

### Attendee Reporting

ConferenceAdit will email Certificates of Completion if all requirements have been met. Attendees must then self-submit credit.

# CPE CREDIT INFORMATION

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By attending the symposium, participants can earn up to 6 CPE credits in these fields of study:

- **Specialized Knowledge** — 2 CPE credits
- **Ethics** — 1 CPE credit
- **Taxes** — 3 CPE credits

The program is designed for advisors who work with a high-net-worth or ultra-high-net-worth client base serving families, family offices, business owners, executives and the unexpectedly single.

The program will provide expert insights and actionable strategies from industry leaders on outlooks, insights and action items on the most vital planning issues of 2025 and beyond.

By attending the Wealth Planning Symposium, you will:

- Gain practical insights on managing complex wealth in an evolving landscape.
- Gain insights and actionable strategies to make the most of opportunities in a new era.

## Additional Information

- This program is complimentary for Northern Trust employees and clients
- There are no cancellation fees associated with this program
- **Delivery method:** Group Internet Based
- **Prerequisites:** General familiarity with estate planning principles
- **Program knowledge level:** Intermediate
- **Advance preparation:** None
- To register for this program, visit our [registration site](#).
- For more information regarding administrative policies such as complaints and refunds, please contact our offices at 312 444 3726.
- **Questions:** Contact Sara Cepeda at [sic1@ntrs.com](mailto:sic1@ntrs.com) or +312 444-4417

Due to NASBA record keeping requirements, you will be monitored on the virtual platform. Information collected by this process is used by Northern Trust and will not be shared with any other organization for any purpose other than NASBA-required audits. You are required to be in attendance for the full session. Any deviation from full session attendance will result in credit forfeit.



## About CPE

The Northern Trust Company is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors website: [www.nasbaregistry.org](http://www.nasbaregistry.org).

# CLE CREDIT INFORMATION

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After the meeting, all attorneys will receive a general CLE attendance certificate that includes formats for both 50-minute and 60-minute credit hour states.

To look up your state's Course ID:

1. Visit [tnti.conferenceadit.com](https://tnti.conferenceadit.com).
2. From the drop-down menu, select the appropriate Institute.
3. Enter the event password (provided after the meeting and located at the bottom of your CLE certificate).
4. Once logged in, select your state to view the Course ID for self-reporting.

If your Course ID is not yet available, you may enter your email address to receive a notification once it is posted.

**For Presenters:**

If you need an updated certificate that reflects speaker credit, please email a copy of your certificate to [info@conferenceadit.com](mailto:info@conferenceadit.com) with your request.

For additional information about CLE accreditation or attendance reporting, visit [tnti.conferenceadit.com](https://tnti.conferenceadit.com) or contact [cle@conferenceadit.com](mailto:cle@conferenceadit.com).

# SESSION CE CREDIT DETAILS

9:00 – 10:10 AM CT

## IN THIS EVERCHANGING WORLD: PLANNING IN A PROTEAN TAX LANDSCAPE PART I

Credits: CLE, CFP, CIMA, CPWA, CTFA and CPE for CPAs

### Learning Objective:

- The current state of income, estate and gift tax law for 2025
- The current law on taxes for 2026, including the sunset of some but not all provisions of the Tax Cuts and Jobs Act
- The process for changing tax laws and the current factors that influence when and how tax policy can be changed
- The proposals to change the tax law and their implications
- The likelihood of changes to the tax law

CPE Field of Study: Taxes

10:20 – 11:20 AM CT

## IN THIS EVERCHANGING WORLD: PLANNING IN A PROTEAN TAX LANDSCAPE PART II

Credits: CLE, CFP, CIMA, CPWA, CTFA and CPE for CPAs

### Learning Objectives:

- Factors to consider in undertaking estate, gift and income tax planning in the current tax environment
- How to draft flexible trusts that can adapt to potential changing laws
- Transactions to accelerate or defer to obtain better income tax outcomes
- Transactions to consider in the current era of tax uncertainty

CPE Field of Study: Taxes

11:30 AM – 12:30 PM CT

## COMPLEX WEBS: TECHNIQUES FOR WEALTH PLANNING THROUGH COMPLIANT STRUCTURES

Credits: CLE, CFP, CIMA, CPWA, CTFA and CPE for CPAs

### Learning Objectives:

- This panel will cover a wide range of privacy topics – from the current state of US Privacy Laws (Federal and State) to the CTA including nuts and bolts on how to implement reporting efficient wealth planning structures

12:50 – 1:50 PM CT

## INFLECTION POINT: PROTECTING YOUR PRACTICE IN A NEW ERA OF CYBERSECURITY AND AI

Credits: CLE, CFP, CIMA, CPWA, CTFA and CPE for CPAs

### Learning Objectives:

- Identify common cyber risks and fraud schemes affecting legal advisors, including emerging threats posed by AI
- Identify regulatory and compliance requirements in estate planning, fiduciary responsibilities, and financial planning
- Examine ethical obligations regarding cybersecurity, data privacy and client confidentiality in practice
- Understand risk mitigation strategies for legal professionals advising HNW clients

CPE Field of Study: Specialized Knowledge

## SESSION CE CREDIT DETAILS *(continued)*

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2:00 – 3:00 PM CT

### ADVISING FOR THE NEW ERA OF LONGEVITY

Credits: CLE, CFP, CIMA, CPWA, CTFA and CPE for CPAs

Learning Objectives:

- The course will address issues such as safeguarding clients' autonomy, managing potential conflicts of interest, ensuring informed decision-making, and upholding fiduciary duties while navigating the complexities of long-term care planning and multi-generational wealth transfer

CPE Field of Study: Ethics

3:10 – 4:15 PM CT

### ADVISING BUSINESS OWNERS IN A NEW ECOSYSTEM OF PRIVATE MARKETS

Credits: CLE, CFP, CIMA, CPWA, CTFA and CPE for CPAs

Learning Objectives:

- The young entrepreneur with a fast-growing business who may not prioritize estate planning and does not yet have a spouse or children
- The successful business owner whose wealth is growing in complexity and is interested in building a family office
- The founder who has sold her business and is now interested in exploring alternative asset classes such as private capital

CPE Field of Study: Taxes

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### CONTACT INFORMATION

For more information regarding administrative policies, please contact:

Northern Trust Contact:

Sara Cepeda

[sic1@ntrs.com](mailto:sic1@ntrs.com)

ConferenceAdit platform:

[info@conferenceadit.com](mailto:info@conferenceadit.com)

CLE Information:

[cle@conferenceadit.com](mailto:cle@conferenceadit.com)



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