

*Ross A. Riskin, DBA, CPA/PFS*  
**Certified College Financial Consultant**



# **2020**

## **SPEAKING ENGAGEMENTS**



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*Connecticut Grown | Nationally Known*

# IT'S NOT THE YEARS, IT'S THE MILEAGE: FINDING SUCCESS AS A NEXTGEN ADVISOR

The average age of a financial advisor is 51. There are more advisors over the age of 70 than there are under the age of 30. Given this extreme age disparity and the fact that the largest transfer of wealth in history is about to occur, what can millennial and Gen Z advisors do to take advantage of these opportunities and be successful in an industry that is going through its renaissance period?

In this presentation, Ross A. Riskin, CPA/PFS, CCFC, - professor, entrepreneur, Chair of the American College's NextGen Advisory Task Force, and the youngest director of a CFP education program in the country - shares some innovative ideas for how to succeed as a NextGen advisor. This presentation is interactive and includes a discussion on the importance of relevant/practical education, being able to communicate across generations, and how to become recognized as an expert regardless of age.



***"Ross really knows his stuff and is an extremely eloquent speaker. His expertise was obvious!"***

## *Audience:*

- Financial Planners
- Investment Advisors
- Accountants
- Attorneys

## *Duration:*

- 45-60 Minutes

## *Fee:*

- \$750 plus reimbursement for travel and lodging

# PLANNING FOR COLLEGE AND HIGHER EDUCATION EXPENSES

With the cost of higher education on the rise, advisors working with individual clients have the opportunity and responsibility to help clients understand how education costs factor into their big picture financial plan.

This presentation will serve as the foundation for which financial planners can learn the basics of college planning and how they can begin to incorporate these services into their practices. The session will discuss how to approach college savings vehicles, the financial aid system, and different strategies associated with the planning areas involved at a minimum



***"Ross Riskin's Planning for College and Higher Education Expenses presentation is one of the best overviews I've seen. He could start a series of progressive sessions and I would sign up for all of them!"***

## *Audience:*

- Financial Planners
- Investment Advisors
- Accountants
- Attorneys

## *Duration:*

- 45-60 Minutes

## *Fee:*

- \$750 plus reimbursement for travel and lodging

# EDUCATION PLANNING FOR THE NEXT DECADE: PRACTICAL STRATEGIES FOR SUCCESS

Due to the rising costs of higher education, clients are relying more than ever on advisors to help them navigate the financial complexities associated with the college funding and financial aid planning processes.

In this presentation, Ross will share creative education planning strategies you can use with business owners, high income/high net worth individuals, middle-income individuals, divorced/divorcing couples, blended/non-traditional families, and grandparents. In addition, Ross will also cover relevant changes from recently passed or proposed legislation so you can stay ahead of the curve from a planning perspective.



***"Ross is clearly an expert in his field and his presentation of the information is easy to follow and well received."***

## *Audience:*

- Financial Planners
- Investment Advisors
- Accountants
- Attorneys

## *Duration:*

- 60-75 Minutes

## *Fee:*

- \$750 plus reimbursement for travel and lodging

# EDUCATION PLANNING FOR BUSINESS OWNERS UNDER CUTS, CURES, AND CARES

Education planning for business owners has always been challenging due to the way the financial aid regulations interact with tax laws. Valuing a business for a client, providing multiple years of detailed financial information, and determining how colleges may assess the assets and income generated from a business are among these challenges.

This presentation will highlight education planning strategies impacted by the Tax Cuts and Jobs Act, SECURE Act, and CARES Act, and will focus on how business entity choice with the new lower corporate tax rate and the new IRC 199A (QBI) deduction will factor in from both financial aid and tax planning perspectives.



***"Mr. Riskin was very knowledgeable, articulate, and provided some very insightful information. I plan to share it with folks in my company as well as in my family. Awesome presentation!"***

## *Audience:*

- Financial Planners
- Investment Advisors
- Accountants
- Attorneys

## *Duration:*

- 60-90 Minutes

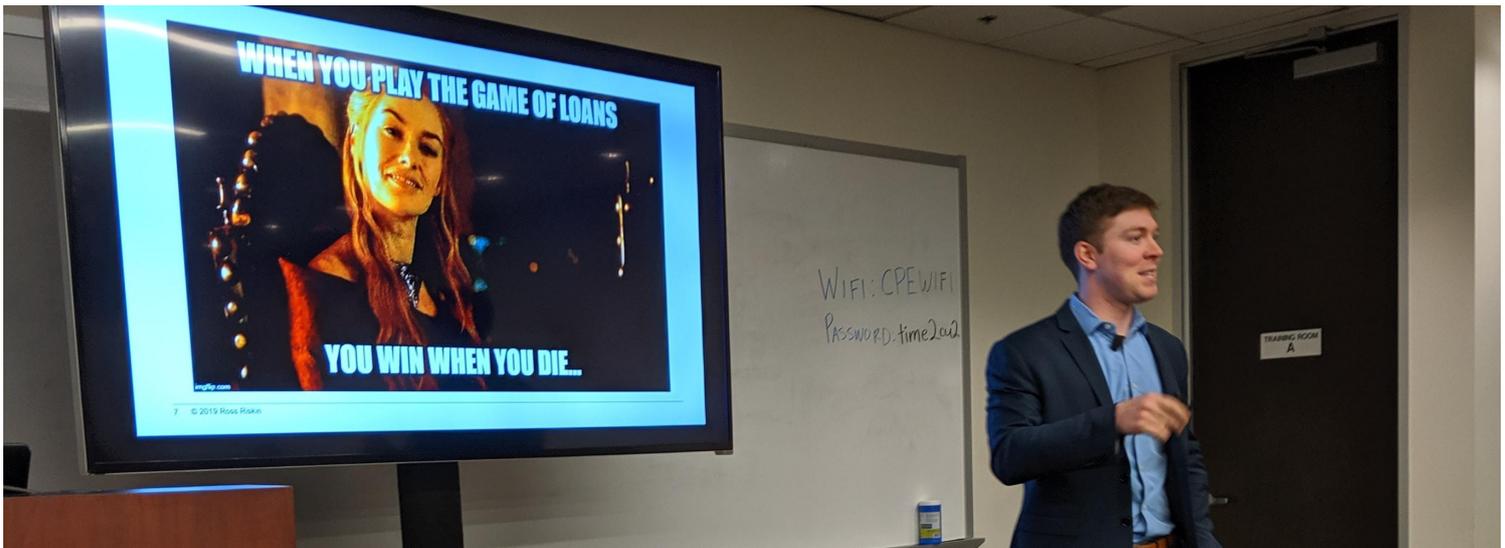
## *Fee:*

- \$750 plus reimbursement for travel and lodging

# PLANNING FOR ALL GENERATIONS: WHAT ADVISORS NEED TO KNOW ABOUT STUDENT LOANS

Federal loans, private loans, subsidized loans, unsubsidized loans, income-based repayment, income contingent repayment, consolidation, deferment, forbearance, forgiveness. Confused yet? These are the terms you need to know as you help your clients navigate the education planning process both before their children go off to college and after graduation.

With total student loan debt approaching the \$1.6 trillion mark, 6-year graduation rates stagnating at 59%, and higher education degrees becoming the minimum requirement for gainful employment in the country, advisors need to know how to guide and educate their clients to effectively and efficiently plan for college when time is on their side and resources are available, and more importantly, when they are not.



***"I thought I knew about student loans, but I learned that there is so much more to it than filling out the FAFSA. It was very interesting to learn that there are strategies available that I was unaware of!"***

## *Audience:*

- Financial Planners
- Investment Advisors
- Accountants
- Attorneys

## *Duration:*

- 60-90 Minutes

## *Fee:*

- \$750 plus reimbursement for travel and lodging

# WHY ROSS SHOULD SPEAK AT YOUR NEXT EVENT

Ross A. Riskin, DBA, CPA/PFS, CCFC, MS Tax is an Associate Professor of Taxation and Director of the CFP/ChFC education programs at the American College of Financial Services. Ross also serves as a Partner in Riskin & Riskin, PC - a public accounting firm located in Orange, Connecticut and is the founder of the American Institute of Certified College Financial Consultants. His research and professional expertise focus on tax planning with respect to college and student loan advising.

Ross is recognized as a leading expert in the areas of tax planning, college planning, and student loan advising. He is the author of *The Adviser's Guide to Education Planning*, which is published by the AICPA Personal Financial Planning Section. Ross has been quoted in media outlets such as *The Wall Street Journal*, *CNBC*, *Yahoo Finance*, *US News*, *Investment News*, and *the New York Times*. His research has also been published in outlets such as the *Journal of Wealth Management*, *Journal of Financial Planning*, *Journal of Accountancy*, *Journal of Multistate Taxation and Incentives*, and *Tax Notes*. Ross has presented to and worked with over 12,000 individuals through webinars, conferences, and in the classroom.

## *Recent Appearances*

- AICPA Engage Conference
- Baruch University Taxation Series Seminar
- CTCPA PFP Conference
- FPA CT Annual Conference
- American Accounting Association CTLA Conference
- FPA DFW Annual Conference
- FPA NorCal Conference
- TXCPA Houston PFP Conference
- The American College Knowledge Summit
- CT Department of Education Personal Finance Conference



**Doctor of Business Administration in Finance**

*Sacred Heart University*

**Master of Science in Taxation**

**Master Personal Financial Planner Certificate**

*Bentley University*

**Bachelor of Science in Accounting**

*Fairfield University*