



Penn Mutual's Judy Lee To Host CPA CPE Training

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Judy Lee with Penn Mutual's Northern California Agency, based in Redwood City, CA, has announced that she will be conducting an upcoming CPA CPE training to be held on September 20th, 2018 at 7:00 pm PDT at the Foster City Recreation Center, 650 Shell Blvd, Foster City, CA 94404. Topics to be covered will include: Qualified Plans and Life Insurance and Traditional Defined Benefit Plans.

Judy Lee holds a BS in Accounting and an MBA. She has over eight years of accounting, auditing, and financial analysis experience. Her firm offers support in the areas of estate planning, business structure and succession, charitable planning and funding, tax mitigation, asset protection, corporate governance, risk management, and efficient wealth transfer.

Certified Public Accountants (CPAs) are required to complete a certain number of Continuing Professional Education (CPE) credits in order to maintain their license. CPE credits demonstrate their professional competence and guarantee that they can continue to deliver professional services. CPAs are responsible for complying with the relevant CPE requirements of the American Institute of CPAs (AICPA) in order to remain registered, and also with the rules and regulations of their individual state boards of accountancy. Furthermore, those that have memberships with other professional associations and organizations may have further requirements.

Judy Lee explains the requirements for California: "CPAs must renew their license on the last day of their birth month every other year. They must complete 80 hours of CPE credits in those two years and they must complete at least 20 hours per year. Additionally, 40 of those hours must be on technical subjects, of which at least 12 must be taken in each year. Furthermore, there is a four hour ethics requirement and, every six years, they must complete a two hour Regulatory Review course that has been approved by the Board."

Those interested in attending the CPA CPE training course and obtaining further details on the number of CPE credits it will provide them are encouraged to contact Judy Lee directly at 650-453-7033. She is looking forward to sharing her knowledge with colleagues, discussing ideas on wealth planning, and networking with others in the industry. The training is set to be very well attended, so people are encouraged to book their places as soon as possible.

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For more information about Penn Mutual Northern California Agency, contact the company here: Penn Mutual Northern California Agency Judy Lee 650-453-7033 lee.judyh@gmail.com 3 Lagoon Dr. Suite 280 Redwood City, CA 94065

Penn Mutual Northern California Agency

Our firm provides an integrated approach with existing advisors to provide greater tax efficiency.

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