

FOR MORE INFORMATION

Healthcare Resources

The Focus article this month offered resources for planning for the transition to Medicare. For more helpful information, including Medicare-related Web sites and an update on the implications of healthcare reform legislation for financial planners, visit www.FPAjournal.org/CurrentIssue/TableofContents/0310FocusResources.



ONLINE-ONLY REPORT

CRM Study

A new study, the *FPA-ActiFi Adviser Technology Report: CRM Edition*, sponsored by TD AMERITRADE Institutional and available electronically free of charge to FPA members, compares 16 different CRM products on 10 key functionality features, from basic contact management to prospect/sales management and workflow capabilities. Find it online at www.FPAnet.org/AdviserTechnologySeries.



INTERACTIVE

Practice Management Tool

The FPA Research Center created an interactive marketing tool based on consumer surveys, to help planners discover which topics are of greatest interest to which target markets, based on investable assets, and therefore which topics to promote in marketing pieces depending on the niche you are trying to reach. Based on your inputs, the results will include links to informational resources from FPA to help you build on those areas of expertise and grow your business. www.FPAnet.org/PracticeManagement/InteractiveMarketingTool (Member login required.)

BETWEEN the ISSUES

Journal of FINANCIAL PLANNING Bonus Online Content

ONLINE-ONLY ARTICLE

Issues and Opportunities Caused by the Repeal of the Estate Tax

by Daniel S. Rubin, J.D., LL.M.

What estate planning tactics should advisers be recommending to clients in light of recent tax law uncertainty? Here are some recommendations. www.FPAjournal.org/BetweentheIssues/LastMonth/Articles/RepealoftheEstateTax



Interactive Talking Point

In this month's "10 Questions with Mary Anne Ehlert," a financial planner recognized for her work with special-needs clients, she contends that planners too often don't inquire of clients whether they might have a special-needs family member. Planners also mistakenly believe special-needs families won't be able to pay for their services.

Do you agree with this assessment? How do you work with special-needs clients? **Discuss this at the FPA LinkedIn site.** (Member login required.)