CE FOR PROFESSIONAL ADVISORS

Opportunity Zones 2.0

New Rules, New Planning Opportunities

1.0 hours of CE for CFP®, CPA, and Enrolled Agents Professionals

About the program

Opportunity Zones are coming up more often in advisor circles, from sponsors, from colleagues and in the financial press. The new rules have made the strategy more attractive for some clients, and more complex. Before it reaches your clients, it helps to know when it fits, when it doesn't, and how to say so.

This CE Approved program gives you a practical planning framework for evaluating Opportunity Zones under the new rules. We cover what changed under the One Big Beautiful Bill Act, including permanent status and the five-year step-up, and what stayed the same.

Then we put it to work. A composite case study compares three paths: doing nothing, paying the tax and reinvesting, and investing through a Qualified Opportunity Fund. It's modeled with professional planning software and includes the suitability and liquidity questions that belong in every Opportunity Zone conversation.

You'll leave better prepared to identify the right clients, ask the right questions, and hold the line when the strategy isn't a fit.

Key takeaways

- What changed under OZ 2.0, what remains, and why permanence matters
- The client profiles and tax situations where an Opportunity Zone belongs in the conversation
- A suitability and liquidity framework for deciding who fits, and who doesn't
- A composite case study comparing doing nothing, paying the tax and reinvesting, and investing through a QOF
- How to evaluate a Qualified Opportunity Fund, and when to say no