



RAYMOND JAMES

December 17, 2007

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THE PLANNER'S WEEKLY

A weekly newsletter for the investment advisor community

FINANCIAL PLANNING

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TOP STORY

Morningstar Broadens Data Coverage

By Stacy Schultz

December 17, 2007 | Morningstar, a leading provider of independent investment research, announced this morning that it has entered into an agreement with Ipreo Holdings to acquire the Hemscott data, media and investor relations website business for \$51.6 million. The deal is expected to close in January.

Hemscott Data provides financial information on nearly all existing public companies in the United States, Canada and the United Kingdom.

[Read the Whole Article](#)

"...there is a growing market for investment information outside the United States..."

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UPCOMING EVENTS

Dec 18 4pm ET

[Get Focused and Organized. Mark Riesenbergh Coaching Session](#)

Jan 8 4pm ET

[Stress Management for the Crazy Advisor. Joe Robinson Coaching Session](#)

Jan 22 - Feb 4

[Simple Steps to a Profitable Client Base. Stephanie Bogan Online Expert Forum](#)

Jan 24 4pm ET

[Setting Your Networking Goals for 2008. Mitch York Coaching Session](#)

INDUSTRY NEWS

Fidelity Backs Away From Health Insurance Claims

Offers a referral service, not affordable coverage to assist breakaway brokers

By Elizabeth O'Brien

December 13, 2007 | Yesterday Fidelity Investments issued a press release announcing several new services to support breakaway brokers, including affordable medical, dental and vision insurance through BenefitProtect. Fidelity is actually offering access to a referral and consulting service that works with independent business owners to purchase healthcare.

[Read the Whole Article](#)

LIMRA and LOMA Join Forces

Two like-minded insurance and financial services organizations to unite at first of the year

By Richard Foreto

December 14, 2007 | LIMRA and LOMA member companies agreed nearly unanimously to unite the two insurance and financial services trade organizations.

[Read the Whole Article](#)

The Hartford Expands Retirement Business

The Hartford Financial Services will acquire Sun Life Retirement Services early next year

By Stacy Schultz

December 13, 2007 | The Hartford Financial Services announced today that it will acquire Sun Life Retirement Services in an effort to grow its assets and expand its national presence.

[Read the Whole Article](#)

HOT TOPICS

Does anyone know off the top of their heads if LLC's in non-domicile state pass ancillary probate or would a person have to move the LLC's into a Revocable Trust in order to do so?

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If a client has left an employer where he has a 401k, should he definitely roll it into his rollover IRA? Is there an advantage to leaving it from a legal judgment perspective?

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Copper is used in so many industries that it's very useful as an indicator of global economic growth. A lot of investors call it "Dr. Copper" ("the only commodity with a PhD in economics").

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I have a new client bringing in \$200,000 per year and is restricted in his 401(k), due to top-heavy rules. Any thoughts out there about getting his AGI down a bit?

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