2024 Advisor Symposium Issues of Interest to Advisors Today

Jeff Chadwick JD

Shareholder; Chair-Wealth Preservation Practice Group
Winstead, PC

Patricia Annino JD, LL.M.

Partner, Trusts and Estate Group, Rimon, P.C.

Christopher Hoyt JD

Professor, University of Missouri Kansas City School of Law

Allen Hensley CLU®, ChFC®, MSFS, AEP®

CVP, Advanced Agent Development Officer
New York Life Insurance Co.

Save the date:
Wednesday, November 6th
2:00 - 5:00 p.m. Eastern

1:00 p.m. - 4:00 p.m.	Central
12:00 p.m. - 3:00 p.m.	Mountain
11:00 a.m. - 2:00 p.m.	Pacific
10:00 a.m. - 1:00 p.m.	Alaska
9:00 a.m. - 12:00 p.m.	Hawaii

New York Life Insurance Company
51 Madison Ave
New York, NY 10010
www.newyorklife.com

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Program agenda

Host: Heather L. Davis, JD, CLU®, ChFC®, CAP®

Time (Eastern)	Presenter	Topic
2:00 - 2:05 pm	Heather Davis	Opening remarks / Welcome
2:05 - 2:30 pm	Jeff Chadwick	Maximizing Wealth Transfers: Strategic Estate Planning and Gifting Solutions Amidst Impending Tax Changes
2:30 - 2:55 pm	Jeff Chadwick and Allen Hensley	Maximizing Wealth Transfers – Case study discussion
2:55 - 3:05 pm	*Break*	
3:05 - 3:30 pm	Patricia Annino	Mastering Family Business Dynamics: Valuations, Agreements, and Strategic Decisions
3:30 - 3:55 pm	Patricia Annino and Allen Hensley	Mastering Family Business Dynamics – Case study discussion
3:55 - 4:05 pm	*Break*	
4:05 - 4:30 pm	Chris Hoyt	Maximizing Tax Savings with Retirement Distributions and Charitable Giving
4:30 - 4:55 pm	Chris Hoyt and Allen Hensley	Maximizing Tax Savings – Case study discussion
4:55 - 5:00 pm	Heather Davis	Closing remarks / Adjourn

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