

DEAN'S HOUR



WHAT ATTORNEYS NEED TO KNOW ABOUT LIFE INSURANCE AND TRUST OWNED LIFE INSURANCE

DATE: Monday, November 14, 2016
TIME: Sign-in 12:30; Program 1:00- 2:00 p.m.
PLACE: Nassau County Bar Association

1 credit in professional practice or skills



All Your CLE For Only \$219!

516-747-4464

www.nassaubar.org

Program Materials

A link to download program materials will be e-mailed prior to each program. Materials will be available for an additional fee at the door.

Email address required.

Appropriate for newly admitted and experienced attorneys.

For financial aid guidelines and arrangements call 516.747.4464.



NASSAU ACADEMY OF LAW

NASSAU COUNTY BAR ASSOCIATION
15th and West Streets
Mineola, NY 11501

516-747-4464
516-747-4147 fax

www.nassaubar.org
academy@nassaubar.org

Learn about new developments that the attorney must be aware of in order to protect their clients' existing life insurance policies that are currently funding their trusts from expiring prematurely; protect those acting as Trustees from suffering consequential liabilities; maximize distributions from policies with long term care or chronic care riders; protect clients' assets against an un-reimbursed long term care expense and more.

Discussion will also include issues the adviser needs to know in order to better manage risk and avoid a crisis.

OUR PANEL

Raymond C. Radigan, Esq.
Head of Private Trust
TD Wealth Management
New York

Henry Montag, CFP, CLTC
Principal, TOLI Center East, Jericho
Co-Author, The Advisors Guide to Managing Risk and Avoiding a Client Crisis (ABA, October 2016)

WHAT ATTORNEYS NEED TO KNOW...LIFE INSURANCE NOVEMBER 14, 2016

Name—PLEASE PRINT _____

Address _____

Phone _____

*Email-REQUIRED to receive link to program materials

Method of Payment Visa MasterCard American Express
 Check payable to NAL (enclosed)

Credit Card # _____ Security Code _____

Signature _____ Exp. date _____

RESERVATIONS

- Member \$30
- Non-Member \$40
- Domus Scholar Circle \$ 0

TOTAL: _____

CD/DVD ORDER DH111416

- Member CD \$40
- Member DVD \$55
- Non-Member CD \$75
- Non-Member DVD \$80

Subtotal: _____

ADD Sales Tax 8.625%: _____

TOTAL: _____

You may also signup online at www.nassaubar.org.