

Program Details

TIME: 12:30-2:15 p.m.
(Sign-in from 12:00 p.m.)

REFRESHMENTS: A light lunch will be served

LOCATION: SCBA Center - 560 Wheeler Road, Hauppauge (Exit 56 off the L.I.E.; one mile north on the left)

MCLE CREDIT: 2 Hours (1 Professional Practice; 1 Skills Transitional and Non-Transitional)

INSTRUCTIONAL LEVEL:
All levels

PRICING:

SCBA Member	\$60
Non-Member	
Attorney	\$80
Law Student Member	\$0
Printed Materials	\$25

FINANCIAL AID: Call 631-234-5588 for info on payment plans, service in lieu of tuition, and need-based grants.

WEBCAST: This program will be webcast. Register online at: scba.inreachce.com

Life Insurance Asset Protection Plans

Tuesday, May 24, 2016, 12:30-2:15 p.m.

Learn about new developments that the attorney must be aware of in order to protect their clients' existing life insurance policies 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.

Our expert faculty will present what you, your clients and Trustee need to know about their life insurance policies funding their irrevocable life insurance trusts, as well as what the Trustee needs to know about their fiduciary responsibility and liability. You'll learn how it is possible to have paid all of your billed premiums in full and on time, for many years, and yet still have a Universal policy lapse without value. Lastly, you'll discover new strategies and uses for trusts that are ideal for inter-generational planning for today's families.

Faculty

Aaron E. Futterman Esq, CPA, *Futterman & Lanza, LLP*
Henry Montag, CFP, CLTC, *The TOLI Center East*
Program Coordinator: *Eileen Coen Cacioppo, Esq.*

Special Thanks to our Sponsor:

Henry Montag CFP, President, The TOLI Center East

Registration: Life Insurance Asset Protection Plans

Pre- Registration

BY MAIL: Return registration with payment to:

Suffolk Academy of Law, 560 Wheeler Rd., Hauppauge, NY 11788

BY FAX: 631-234-5899

BY PHONE: 631-234-5588

ON-LINE: www.scba.org

Name: _____

Address: _____

Phone: _____

E-Mail _____

SCBA Member \$60

Non-Member Attorney \$80

Law Student Member \$0

Printed Materials \$25**

At Door Registration: \$10 additional.

Method of Payment: Cash Check (payable to Suffolk Academy of Law)

Charge: Please register online at <https://www.scba.org/salregform.php> or contact the Academy to pay by credit card

Academy Pass: 12-Session Pass CLE Bundle

**** Materials will be provided electronically via an internet link to a PDF. Bring your laptop or other mobile device if you wish to access the materials during the program. Printed materials can be provided for an additional charge and must be ordered in advance.**

