

DEAN'S HOUR



DRAFTING, FUNDING & PROPERLY MAINTAINING AN ILIT & SNT

WITH THE NCBA INSURANCE LAW COMMITTEE

DATE: May 3, 2018
TIME: Sign-in 12:30PM; Discussion 1-2PM
PLACE: Nassau County Bar Association

1 credit in professional practice or skills

Refund Policy

You may cancel your registration within 24 hours of program date for a refund to the original form of payment.

Program Materials

A link to download program materials will be e-mailed prior to each program. CLE certificates of attendance will also be emailed.

Email address required.

Appropriate for newly admitted and experienced attorneys.

For financial aid guidelines and arrangements call 516.747.4464.



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ACADEMY
OF LAW**

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Over the years, many have called attention to the problem of prematurely expiring life insurance and what CPAs and attorneys need to know in order to advise and assist their clients' trustees (usually an eldest son or daughter) regarding the performance and monitoring of the life insurance policy for which they are responsible. This is an issue regardless of whether the life insurance policy is owned individually by the son or daughter or whether they sign as a trustee if a trust exists. In either case, the mechanics are the same. This program will help make sense of drafting, funding and properly maintaining irrevocable life insurance trusts (ILIT) and supplemental needs trusts (SNT)

GUEST SPEAKER

**Robert S. Barnett, CPA, JD, MS; Capell Barnett Matalon et al, Jericho
Henry Montag, CFP** The TOLI Center East

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