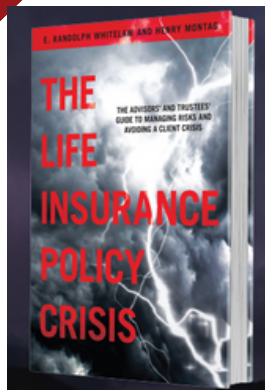
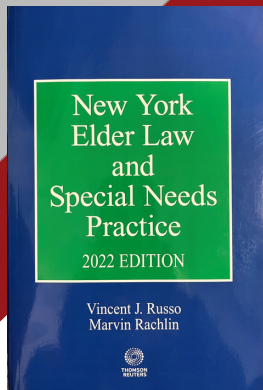




DEAN'S HOUR PROPERLY DRAFTING AND MAINTAINING LIFE INSURANCE IN TRUSTS



November 15, 2023 (Hybrid)

Nassau County Bar Association, Mineola, NY

12:30 PM - 2:00 PM

1.5 Credit in Professional Practice

Program Description

The great majority of current trustees responsible for your clients ILIT's are their eldest siblings acting as unskilled/amateur trustees. For the most part, they are not aware of various opportunities and strategies available to them, nor are they aware of the responsibility and fiduciary liability they've assumed for the maintenance of the life insurance funding the trust. Speakers will discuss various strategies to enhance drafting, trust planning, and life insurance management so as to enhance and create a larger legacy for the trust beneficiaries.

Guest Speakers:

Vincent J. Russo, Esq., Managing Shareholder of Russo Law Group, P.C.

Henry Montag, CFP, Managing Director The TOLI Center East

PLEASE COMPLETE BELOW

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

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