2017 Feldman Forum:

Strategic planning for various levels of wealth.

Michael Broderick
Atlantic Planning Group

Samuel A. Donaldson
Georgia State University College of Law

Robert S. Keebler
Keebler & Associates LLP

Heather Davis
The Nautilus Group®

Greg Holmgren
New York Life Insurance Company

Thursday, May 4, 2017

For more information: www.NYLAdvisors.com/2017FF

1:00 p.m. – 5:00 p.m. Eastern
12:00 p.m. – 4:00 p.m. Central
11:00 a.m. – 3:00 p.m. Mountain
10:00 a.m. – 2:00 p.m. Pacific

Presenters:

Michael Broderick, CFP®, CLU®, ChFC®, CAP®
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Samuel A. Donaldson, JD, LL.M.
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Corporate Vice President
New York Life Insurance Company

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Agenda

Moderator: Heather L. Davis, JD, CLU®, ChFC®, CAP®, AEP®

Program Times (Eastern)	Presenter	Title
1:00 pm	Greg Holmgren	Setting the stage
1:10 pm	Michael Broderick & Heather Davis	Case Study - Part 1
1:20 pm	Sam Donaldson	Planning for a $2 million estate
1:35 pm	Bob Keebler	Income tax solutions for a $2 million estate
1:50 pm	Greg Holmgren	Core solutions for a $2 million estate
2:05 pm	Michael Broderick & Heather Davis	Case study - Part 2
2:20 pm	*Networking Break*	
2:30 pm	*Q and A*	
2:35 pm	Sam Donaldson	Planning for an $8 million estate
2:50 pm	Bob Keebler	Income tax solutions for an $8 million estate
3:05 pm	Greg Holmgren	Core solutions for an $8 million estate
3:20 pm	Michael Broderick & Heather Davis	Case study - Part 3
3:35 pm	*Networking Break*	
3:45 pm	*Q and A*	
3:50 pm	Sam Donaldson	Planning for a $20 million estate
4:10 pm	Bob Keebler	Income tax solutions for a $20 million estate
4:30 pm	Greg Holmgren	Core solutions for a $20 million estate
4:45 pm	Michael Broderick & Heather Davis	Case study - Wrap up
5:00 pm	*Adjourn*	

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