

# 2018 Advisor Symposium: Issues of Interest to Advisors Today



**Martin Shenkman**  
Shenkman Law

**Robert Keebler**  
Keebler & Associates



**Patricia Annino**  
Rimon P.C.

**Greg Holmgren**  
New York Life Insurance  
Company



**Heather Davis**  
The Nautilus Group®

## Tuesday, November 6, 2018

Register at: [NYLAdvisors.com/2018AS](http://NYLAdvisors.com/2018AS)

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:

**Martin M. Shenkman,**  
CPA, MBA, PFS, AEP®  
(Distinguished), JD

Shenkman Law  
Fort Lee, NJ

**Robert S. Keebler,**  
CPA/PFS, MST, AEP®  
(Distinguished)

Keebler & Associates LLP  
Green Bay, WI

**Patricia M. Annino, JD,**  
LL.M.

Rimon P.C.  
Boston, MA

**Greg Holmgren, CLU®,**  
ChFC®

New York Life  
Insurance Company  
New York, NY

**Heather Davis, JD,**  
CLU®, ChFC®, CAP®,  
AEP®

The Nautilus Group®  
Addison, TX

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# Agenda

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

## Program Times (Eastern)

	Presenter	Title
1:00 pm	Heather Davis	Introduction and Welcome
1:05 pm	Martin Shenkman	Trust Planning in the New Planning Environment - Part 1
1:30 pm	Robert Keebler	Planning for Section 199A, Including Estates and Trusts
1:55 pm	Greg Holmgren	Buy-Sell Planning: Issues and Solutions
2:20 pm	Patricia Annino	Ethics in a Challenging World - Part 1
2:45 pm	<i>Networking break &amp; Q and A</i>	
3:00 pm	Patricia Annino	Ethics in a Challenging World - Part 2
3:25 pm	Martin Shenkman	Trust Planning in the New Planning Environment - Part 2
3:55 pm	<i>Networking break &amp; Q and A</i>	
4:05 pm	Robert Keebler	How to Use Non-Grantor Trusts After the Tax Cuts and Jobs Act
4:30 pm	Greg Holmgren	Why Life Insurance?
4:55 pm	Heather Davis	Closing Remarks
5:00 pm	<i>Adjourn</i>	

The 2018 Advisor Symposium qualifies with NASBA for up to 4.0 hours of CPE credit in the category "Taxes." This intermediate-level (group live) course is offered for the benefit of practicing accountants, newly admitted and experienced attorneys, trust officers, and insurance and/or financial planning professionals with significant exposure to the subjects and will focus on the development of in-depth knowledge necessary for proper consulting. This program will provide the participant with an overview of technical topics related to the importance of planning for clients using trusts and how the 2017 Tax Act has changed the planning environment, planning for business continuation, why life insurance is an important planning tool, and ethical practices. Please refer to the agenda for detailed program information. Suggested prerequisite: one (1) year of accounting-related experience; no advanced preparation is necessary. New York Life Insurance Company is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors via its website: [www.nasbaregistry.org](http://www.nasbaregistry.org). For more information regarding registration, refund, complaint and program cancellation, please contact New York Life Insurance Company's home office representative at 972-720-6704.

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