

2026 Advisor Symposium

Issues of Interest to Advisors Today

November 4, 2026

2:00 – 5:00 PM Eastern



**Steve Parrish, JD, RICP®,
CLU®, ChFC®, AEP®**

Professor of Practice & Scholar in
Residence, The American College
of Financial Services



**Alan S. Gassman
JD, LL.M., AEP®**

Gassman, Denicolo &
Ketron, P.A.



**Kathleen W.
Bilderback
JD, LL.M.**

Sandberg Phoenix



**Allen Hensley, CLU®,
ChFC®, MSFS, AEP®**

CVP, Advanced Agent
Development Officer
New York Life Insurance

Register to attend at:
www.NYLAdvisors.com/2026AS

1:00 p.m. - 4:00 p.m.

12:00 p.m. - 3:00 p.m.

11:00 a.m. - 2:00 p.m.

10:00 a.m. - 1:00 p.m.

9:00 a.m. - 12:00 p.m.

Central

Mountain

Pacific

Alaska

Hawaii



New York Life Insurance Company
51 Madison Ave
New York, NY 10010
www.newyorklife.com



Program agenda

Time (Eastern)	Presenter	Topic
2:00 - 2:05 pm	Sarah Frances Trampe	Welcome / Opening remarks
2:05 - 2:35 pm	Steve Parrish	Wealth Transfer, Income Tax Planning & Family Succession
2:35 - 2:50 pm	Steve Parrish and Allen Hensley	Case Study #1 discussion: Tom and Linda Reynolds
2:50 - 3:00 pm	<i>Break</i>	
3:00 - 3:30 pm	Alan Gassman	Advanced Estate Planning in a Changing Environment
3:30 - 3:50 pm	Alan Gassman and Allen Hensley	Case Study #2 discussion: Robert and Susan Whitman
3:50 - 4:00 pm	<i>Break</i>	
4:00 - 4:30 pm	Kathleen Bilderback	Business Succession & Buy-Sell Planning
4:30 - 4:50 pm	Kathleen Bilderback and Allen Hensley	Case Study #3 discussion: SentinelPay Analytics
4:50 - 4:55 pm	Allen Hensley	Wrap up
4:55 - 5:00 pm	Sarah Frances Trampe	Closing remarks / Adjourn

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