NOVEMBER LUNCHEON PROGRAM

"UNWINDING AN UNWORKABLE TRANSACTION WITH A WORKABLE POLICY – DEALING WITH ILITS, SPLIT DOLLAR AGREEMENTS AND CLOSELY-HELD BUSINESS OR BUSINESS OWNER OWNING A POLICY"

TUESDAY, NOVEMBER 19, 2019

THE UNION LEAGUE
140 SOUTH BROAD STREET
PHILADELPHIA, PA 19102

11:45 – 12:00 P.M. REGISTRATION
12:00 – 12:30 P.M. LUNCHEON
12:30 – 1:45 P.M. PROGRAM

This presentation will provide insights into current and likely future planning opportunities with life insurance. We will discuss why insurance is an important asset in a client's overall portfolio/business/balance sheet. We will review how to properly analyze and implement (or refine) certain wealth transfer strategies that utilize (or already own) insurance. If the prior structure/transaction or trust is no longer working, what are the planning hurdles and steps that must be considered and implemented? We will conclude with a discussion about how the future in insurance solutions is not bleak, but rather exciting and challenging.

One Education Credit for CLE (PA Only), Insurance (PA Only), CFP, CPA (PA Only), PACE and CTFA will be offered.

Speaker:
Todd Steinberg is a Trusts & Estates Practice Leader at Loeb & Loeb LLP in their Washington, D.C. office. He focuses his practice on helping high net worth individuals and families navigate complex and sophisticated estate and income tax planning matters. He assists clients with multi-generational wealth preservation and accumulation, as well as probate and trust administration, and charitable planned giving. Todd has substantial experience in complex, post-death estate and trust administration, as well as fiduciary litigation matters. He has represented clients in IRS estate and gift tax examinations, IRS appeals and related state and federal tax controversy matters.

Todd also implements business succession and transition planning for privately held companies, business owners and entrepreneurs, helping them reach financial goals for their companies and build and preserve their personal net worth. He has a particular depth of experience in planning with life insurance products and regularly provides counsel to allied professionals in the insurance industry.

This meeting is being sponsored by

PERSPECTIVE FINANCIAL GROUP
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November 19, 2019 LUNCHEON PROGRAM
Registration Form

Luncheon Program Fee:

PEPC Members	$45	Non-Members	$65

Additional Fees:

CLE Credit (Members)	$15	CLE Credit (Non-Members)	$15
Insurance Credit (Members)	$15	Insurance Credit (Non-Members)	$15
CFP® Credit (Members)	$15	CFP® Credit (Non-Members)	$15

$5 additional charge for walk-in registrations at the door without pre-registration.
No-shows will be billed. No refunds after November 15, 2019.

ATTENDEE INFORMATION:

Name: ______________________________ Discipline: ______________________
Company: ____
Address: ____
City, State, Zip: ______________________________________
Phone: ______________________ Email: ______________________

☐ PEPC Member ($45 per person) ☐ Non-Member ($65 per person)

Please select your lunch entrée:

☐ Tomato Braised Short Ribs, Parmesan Polenta, Broccolini
☐ Eggplant Napoleon, Spinach Ricotta, Haricot Vert, Tomato Compote
☐ Special Dietary Needs: ______________________________________

CONTINUING EDUCATION INFORMATION:

(Fee: $15 per Credit)

☐ Continuing Legal Education (1 credit)..................Attorney ID: ______________________
☐ Insurance Continuing Education (1 credit)...........License Number: ______________________
☐ CFP® Continuing Education (1 credit)..................Last 4 Digits of SSN: ______________________

CTFA, PACE and CPA Credits available onsite at the meeting at no additional charge.

PAYMENT INFORMATION:

☐ Check Payment (Payable to PEPC)
☐ Credit Card Payments – **Website Only**

PEPC is no longer accepting credit card payments via faxed or mailed registration forms. Any credit card payments must be submitted through our secure website at www.philaepc.org. **Members must be logged into the site to receive the discounted member pricing.**

Return by Mail: Philadelphia Estate Planning Council, P.O. Box 579, Moorestown, NJ 08057
Return by Fax: 856-727-9504 **Register Online:** www.philaepc.org
Questions: 215-486-6215 *(Registrations will not be accepted via phone)*