# 2025 Advisor Symposium

## Issues of Interest to Advisors Today

**November 5, 2025**
**2:00 - 5:00 p.m. Eastern**

**Jeff Chadwick**
**JD**
Shareholder; Chair-Wealth Preservation Practice Group
Winstead, PC

**Patricia Annino**
**JD, LL.M.**
Partner, Trusts and Estate Group, Rimon, P.C.

**Christopher Hoyt**
**JD**
Professor, University of Missouri Kansas City School of Law

**Allen Hensley CLU®, ChFC®, MSFS, AEP®**
CVP, Advanced Agent Development Officer
New York Life Insurance Co.

Register to attend at
**www.NYLAdvisors.com/2025AS/**

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|---|---|
| 1:00 p.m. - 4:00 p.m. | Central |
| 12:00 p.m. - 3:00 p.m. | Mountain |
| 11:00 a.m. - 2:00 p.m. | Pacific |
| 10:00 a.m. - 1:00 p.m. | Alaska |
| 9:00 a.m. - 12:00 p.m. | Hawaii |


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# Agenda

| Time (Eastern) | Presenter | Topic |
|---|---|---|
| 2:00 - 2:05 pm | Sarah Frances Trampe | Welcome / Opening remarks |
| 2:05 - 2:30 pm | **Jeff Chadwick** | **Trust Planning for Business Owners** |
| 2:30 - 2:55 pm | **Jeff Chadwick and Allen Hensley** | **Trust Planning for Business Owners: Case study discussion** |
| 2:55 - 3:05 pm | *Break* | |
| 3:05 - 3:30 pm | **Patricia Annino** | **Filling the Gap between Business & Estate Planning: Essential Questions for Business Owner Clients** |
| 3:30 - 3:55 pm | **Patricia Annino and Allen Hensley** | **Filling the Gap between Business & Estate Planning: Case study discussion** |
| 3:55 - 4:05 pm | *Break* | |
| 4:05 - 4:30 pm | **Christopher Hoyt** | **Income and Estate Planning for Retirement Assets** |
| 4:30 - 4:55 pm | **Christopher Hoyt and Allen Hensley** | **Income and Estate Planning for Retirement Assets: Case study discussion** |
| 4:55 - 5:00 pm | Sarah Frances Trampe | Closing remarks / Adjourn |