## 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<sup>®</sup>, ChFC<sup>®</sup>, MSFS, AEP<sup>®</sup>

CVP, Advanced Agent Development Officer New York Life Insurance Co.

## Register to attend at

www.NYLAdvisors.com/2025AS/

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

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

Mountain

Central

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

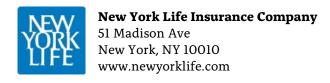
Pacific

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

Alaska

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

Hawaii





## Agenda

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

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