

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/

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



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



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	<i>Break</i>	
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	<i>Break</i>	
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

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