2025 Advisor Symposium

Issues of Interest to Advisors Today

Save the date!



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.

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

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
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Program 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

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