

# LIVING BENEFITS AND TAX ISSUES OF LIFE INSURANCE

## Wednesday, May 22, 2019

**TIME:**

12:30 – 2:10 p.m.  
Registration begins  
12 noon

**REFRESHMENTS:**

A light lunch will be served.

**LOCATION:** SCBA

Center - 560 Wheeler  
Road, Hauppauge (Exit 56  
off the L.I.E.; one mile north  
on the left)

**MCLE CREDIT:**  
**2.0 Professional  
Practice**

(Transitional and Non-  
Transitional)

**INSTRUCTIONAL  
LEVEL:**

Intermediate and Advanced

**PRICING:**

SCBA Member	\$60
Non-Member	\$75
Attorney	
Law Student	\$0
Member	

**FINANCIAL AID:**

Call 631-234-5588 for  
information.

**Materials will be provided  
electronically.**

Very few consumers or professionals are aware that a life insurance policy can also be:

- Used to provide living benefits payable to the insured
- Treated as an asset class that can be used as a tax deferred accumulation vehicle
- As a conduit to maximize financial contributions
- As a tax favored and tax free asset distribution vehicle
- To supplement retirement individually or corporately
- To pay long term care insurance premiums and expenses
- To provide a guaranteed income stream for one or more lives
- As a life settlement to provide maximum lump sum capital
- To fund buyout of partners or shareholders

Join us to hear highly esteemed speakers in this field to learn the strategic use of the various life insurance products to achieve desired benefits as well as the various tax aspects of each chosen option.

**Faculty:**

Henry Montag, CFP, TOLI Center, East  
Gary B. Shreiner, Esq., AEP, The Schreiner Law Group, PC  
Stephen Jay Shorrock, President and Director, LifeVentures Corp.  
Former President of Bankers Life Ins. Co.

**Program Coordinator:**

Eileen Coen Cacioppo, Esq.



**Name:** \_\_\_\_\_

**E-Mail:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

SCBA Member \$60       Non-Member Attorney \$75

Law Student Member NC      **At Door Registration:** \$10 additional

**Method of Payment:**  Cash  Check (payable to Suffolk Academy of Law)

**To Pay by Credit Card go to [www.scba.org](http://www.scba.org)**

12-Session Pass     18B     Scholars Club

**PROGRAM WILL BE RECORDED AND WEBCAST**

