Dear Advisor,

You've read about what I consider to be the 2 most important areas you and your clients need to be aware of when it comes to the subject of life insurance.

1. The anticipated 'Death Benefit Coverage' of many life Insurance policies are expiring years earlier than expected.
2. Life Insurance is also an 'Asset Class' with unique 'Living Benefits' you and your clients need to be aware of.

On Dec 10th I'm honored to have been invited by the NY State Bar Association to discuss via webinar the contents of an article I co-authored that appears in the current issue of the NY State Bar Association Senior Lawyer Journal titled "The Little Known Hidden Living Benefits in a Life Insurance Policy."

If you would like to view the webinar, write back and I'll send you a complimentary link. If you're unable to attend and would like a copy of the article & my handouts, or have any questions, write back and I'll be happy to send a copy, or set up a time to speak.

NYSBA NEW YORK STATE BAR ASSOCIATION
Serving the legal profession and the community since 1876

EVENT DETAILS

NYSBA

Date:
Tuesday, December 10, 2019

Time:
12:00 PM - 12:30 PM Eastern Standard Time

LAWYER WELL-BEING WEBINAR SERIES
THE LITTLE KNOWN BENEFITS OF A LIFE INSURANCE POLICY

The Little Known Living Benefits of a Life Insurance Policy
(*Henry Montag, CFP, CLTC | Managing Director of The TOLI Center East***).**

This program is intended to provide information which an attorney needs to know about the basics of life insurance in a changing climate where living benefits can be of equal importance to the insured of a life insurance policy. Among the topics to be discussed are Life Settlements and the use of a life insurance policy to pay for long term care expenses.

NEW YORK STATE
BAR ASSOCIATION
NYSBA

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Henry Montag CFP, Managing Director of The TOLI Center East in practice since 1976 with offices in L.I N.Y, has authored articles and acted as a source for NYSBA Senior Lawyer, NYSSCPA Tax Stringer, Tax Facts, Bloomberg's Estates Gift & Trust Journal, Trusts & Estate Magazine, Accounting Today, Long Island Business News, Financial Planning, & The Wall Street Journal.

He has appeared as a guest on Wall Street Week, Fox Business News & News 12. He's provided CPE & CLE continuing education credits to NYSBA, ABA, AICPA, NYSSCPA, & the estate Planning Council. He co-authored an American Bar Association Flagship publication, Jan 2017, titled; "The Advisors' & Trustees' Guide to Managing Risk" The Jan 2019 issue of Commerce Clearing House, referred to him as; "One of today's best brains in life Insurance.