



New York Life 2020 Advisor Webinar Series

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Date:

January 29

April 29

July 29

October 14

Presenter and Topic:

Attorney Steven J. Oshins: Private Decanting: Changing an Irrevocable Trust Without Your Entire Family Knowing

Dr. Jeremy S. Lurey: Building a High-Performing Team to Serve High Net Worth Clients

Attorney Martin M. Shenkman: Planning Steps Clients of All Sizes Should Take Before the 2020 Election (and the Impact on Insurance Planning)

Prof. Thomas M. Brinker: Identifying Tax Traps and Financial Nuances for Families Caring for Children with Special Needs

All Webinars:

3:00-4:00 p.m. Eastern

2:00-3:00 p.m. Central

1:00-2:00 p.m. Mountain

Noon-1:00 p.m. Pacific

Accountants:

If you have a course monitor at your viewing location and you pre-register to attend, you can earn CPE credit for attending these webinars. These courses qualify with NASBA for 1.0 hour of CPE credit in the category Taxes.

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