



DETAILED COURSE SCHEDULE – PROGRAM TWO, SEPTEMBER 24, 2021

BOCA RATON

- 8-8:05 a.m. Introduction/Announcements, **Lou Nostro**, Program Chair
- 8:05-9 a.m. Advanced Life Insurance Planning, **David Pratt**
- 9-9:50 a.m. Root and Wings: Structuring a Trust to Give Beneficiaries a Chance at Success (Despite Inheriting Money), **Amy Kanyuk**
- 9:50-10:10 a.m. Break
- 10:10-11 a.m. Homestead, **Jeff Baskies**
- 11 a.m.- 12 p.m. Charitable Planning, **Brad Bedingfield**
- 12-1 p.m. Lunch with Florida ACTEC Fellows, Program Sponsors
- 1-2:40 p.m. Strategic Estate Planning Opportunities, **Diana Zeydel and Mark Parthemer**
- 2:40-3 p.m. Break
- 3-3:55 p.m. Planning for Business Owners & Trusts in Light of Changing Income Rates, **Steve Gorin**
- 3:55-4 p.m. Closing Remarks & Adjournment, **Lou Nostro**

Please note that attendance will be verified for each session.

Sincere Thanks to our Program 2 Sponsors

