BANK OF STOCKTON

Wealth Management Group

Presents ABA Trust & Estate Briefing Series

Developments of Life Insurance Planning
Thursday, September 5, 2019

10:00 am – 12:00 pm
(9:30 Continental Breakfast)

Bank of Stockton Wealth Management Group
555 W. Benjamin Holt Drive, Bldg. A, Stockton, CA 95207

Many older life insurance products are performing poorly, and newer products have become increasingly sophisticated and personalized. At the same time, the significant increase in estate tax exclusion has changed the role of life insurance in many estate plans away from providing liquidity for estate taxes. This combination of factors makes it important to review the role of life insurance in current estate plans.

This Briefing will focus on:

- Consideration in reviewing a life insurance portfolio
- Income tax planning with insurance and use of private placement
- Fixing or terminating existing irrevocable life insurance trusts and issues when policies are transferred
- Developments with private split dollar insurance plans
- Premium financing

To Register: Contact Lynn Salerno (209) 929-1521 or lsalerno@bankofstockton.com
By Tuesday, September 3, 2019

Bank of Stockton does not charge to attend the Trust Briefing Series. However, there is a nominal cost for your professional credits: **$20 for SJCBA Members** and **$40 for Non-Members**.

For information on MCLE credits, please contact the SJCBA (209) 948-0125

This activity has been approved for Minimum Continuing Legal Education credit by the State Bar of California in the amount of two (2) participatory hours, of which two (2) hours credit will apply to the General MCLE Requirement. The SJCBA certifies that this activity conforms to the standards for approved education activities prescribed by the rules and regulations of the State Bar of California governing minimum continuing legal education.

This briefing has been approved for 2.5 CTFA, 2.0 CFP and 2.0 CPE for Specialized Knowledge