



May 19, 2011

## Schedule of Presenters

9:00-10:00 a.m.

- **Philip E. Heckerling** Estate Planning Institute University of Miami Law School, “Life Insurance and Charities: The Basics, Advanced and Over the Edge(?)” and panel member “Life Insurance, Charities and Beyond,” Orlando, Florida. [[Table of Contents](#)]

10:00-11:00 a.m.

- **Joan Morasco:** Advanced Marketing Radio, topic: “Shark Fin CLATS and Life Insurance.” Greenwich, CT.

11:00-12:00 a.m.

- **Peter Levesque, CLU** “Life Insurance and Charities: the Basics, the Advanced and Over the Edge?”, the Estate Planning Council for Central Florida, Miami.

12:00-1:30 a.m.

### Lunch on the Veranda

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2:00-4:00 p.m. ( Key Note Speaker )

- **Michael W. McCullom:** CEO of Custom Benefits Group discusses the advantages of HRA plans in reducing healthcare costs as well as the new broker/client paradigm. [[Table of Contents](#)]

4:15-6:00 p.m.

- **Suzanne Moskowicz:** Planned Giving Council of Houston Conference, “Life Insurance and Charities: The Basics, Advanced and over the Edge?” Tampa, FL.



May 20, 2011

## Schedule of Presenters

9:00-10:00 a.m.

- **John Daniels, CLU, CFA** Northwestern Mutual life Insurance Company Boston Office, “Anatomy of Estate Planning” Boston, MA.

11:00-12:00 a.m.

- **Ashley Leighton:** Society of Financial Professionals, Clinic for Advanced Professionals, speech “Still Crummey After All These Years!!” and workshop “Anatomy of a Crummey Power,” Philadelphia, Pennsylvania

12:00-1:30 a.m.

### Lunch in Austin Room

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2:00-4:00 p.m. ( Key Note Speaker )

- **Joseph Liddell:** Tax and Estate Planning Institute, “Charitable Lead Trusts – The Underused Family Wealth Transfer Technique for the Charitably Inclined” and panel member “Shark Fin CLATs,” South Bend, Indiana. [[Table of Contents](#)]

4:15-6:00 p.m.

- **Robert Haswell, CLU, CEBS:** National Association of Estate Planners and Councils 48th Annual Conference, “Business Insurance and Compensation,” San Antonio, Texas