Where: Ruth Eckerd Hall
When: October 23, 2013
What: 4 hours CE for attorneys, CPAs, CFPs, CTFAs & CLUs.

Presenters:
- Sean Casey, SVP
  Fifth Third Bank
- Sandra Diamond, Esq.
- Barry D. Flagg, CEBS
- Alan S. Gassman, Esq.

Cost: $75 per person
(payable to Pinellas County Estate Planning Council, Inc.)

Contact Ellen Mantegna (727) 385-5321 or EMANTEGNA@VERIZON.NET.

Program

~ 7:15 – 8:00am – Breakfast/Networking

~ 8:00 – 8:50am – Presentation #1
  Economic Update
  Sean Casey, SVP – Director
  Regional Portfolio Management
  Fifth Third Private Bank

~ 8:50 – 9:00am - Break

~ 9:00 – 9:50am – Presentation #2
  Recent Trust Developments
  “Tips, Tricks And Traps”
  Sandra F. Diamond, Esq.
  Williamson, Diamond & Caton, P.A.

~ 9:50 – 10:00am – Break

~ 10:00 – 10:50am – Presentation #3
  “New Standards for Managing Life Insurance as an Asset”
  Barry D. Flagg, CEBS, CFP, CLU, ChFC
  THEInsuranceAdvisor.com

~ 10:50 – 11:00am – Break

~ 11:00 – 11:50 – Presentation #4
  “Estate Planning Hot Topics”
  Alan S. Gassman, Esq.
  Gassman Law Associates, P.A.