



**Business  
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CENTER**



**Kathleen Bilderback**  
Affinity Law Group

# ADVANCED PRACTICE SYMPOSIUM

September 16th, 23rd & 30th from 2-3 pm eastern  
**"Meet the Feldmans" Case Study**

The National Association of Insurance & Financial Advisors (NAIFA) and Financial Service Professionals (FSP) have joined together to create a three-part virtual event to allow participants to work through a complex case with a panel of family estate and business planning experts.



**KEITH GILLIES**  
CFP, CLU, ChFC  
LaPlace, LA  
National Past President  
LOYAL MEMBER SINCE 1981

*"We designed this event to allow financial advisors to not only identify pitfalls in complex cases, but to enforce the need to create a network of trusted professionals who are experts in their specific area. Often, only through a great team can a client receive exceptional care."*

## Facts About the Event:

- Case study scenario is distributed prior to the event for review & consideration
- Expert speakers use the case study as a framework for in-depth discussions with both online & in-person attendee live participation opportunities

## Topics Include:

- Estate planning involving family-owned business with complex family relationships
- Executive benefits in family-owned businesses
- Business succession issues

**NATIONAL ASSOCIATION OF INSURANCE  
AND FINANCIAL ADVISORS**

2901 Telestar Ct. Falls Church, VA 22042

Phone: 877-866-2432

Email: [programs@naifa.org](mailto:programs@naifa.org)

[bpc.naifa.org/symposium](http://bpc.naifa.org/symposium)



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# ADVANCED PRACTICE SYMPOSIUM SERIES

AUGUST 2020 | VIRTUAL

## FEATURED EXPERTS

### RON LEE

JD, CLU, CHFC, CAP  
VP, ADVANCED MARKETS &  
BROKERAGE FIELD RELATIONS  
MUTUAL OF OMAHA

### KATHLEEN BILDERBACK

JD, LL.M.  
ATTORNEY  
AFFINITY LAW GROUP

### ANDREW RINN

JD, CFP, CLU, CHFC  
VP, ADVANCED MARKETS &  
PRACTICE MANAGEMENT &  
DEVELOPMENT  
AMERITAS

## REGISTRATION

### INDIVIDUAL

NAIFA & FSP Members:  
**\$99 Virtual**

Non-Members:  
**\$150 Virtual**

### AGENCY

Contact us for pricing

## SCHEDULE

September 16, 2020

2-3 pm SESSION LEADER: RON LEE

September 23, 2020

2-3 pm SESSION LEADER:  
KATHLEEN BILDERBACK

September 30, 2020

2-3 pm SESSION LEADER: ANDREW RINN

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