FLASTER GREENBERG
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The Use of Captive Insurance Companies in Business and Estate Planning

June 5, 2014
Flaster Greenberg PC, Wilmington Trust SP Services, Inc., Wells Fargo Advisors, LLC

Flaster Greenberg PC, Wilmington Trust SP Services, Inc., and Wells Fargo Advisors, LLC are joining forces to co-host this informative and timely program.

The seminar will discuss the distinctive features of captive insurance companies, the types of risks that can be insured through a captive, the advantages and disadvantages of using captives for various purposes, the tax consequences of using a captive, investment options for premiums paid to a captive, and the use of captives for estate planning purposes.

Professional Credits:

- **Accountants**: 2 CPE credits
  - Course level: Basic
  - Instructional Method: Group Live
  - Prerequisites: None
  - Advanced preparation: None
  - Fee: None
  - 24-hour advance notice preferred for cancellation

For more information regarding program cancellation policies and/or concerns, please contact the Wilmington Trust offices at 302.651.8321.

Speakers:

- **Bernard "Buz" Eizen, Esq.**, Shareholder, Flaster Greenberg PC
- **Richard F. Klumpp, JD, CPA, CGMA**, President & CEO, Wilmington Trust SP Services, Inc.
- **Matthew S. Montenero, MBA, CFP®**, Vice President – Investment Officer, Wells Fargo Advisors, LLC
- **Steven S. Poulathas, Esq.**, Shareholder, Flaster Greenberg PC

Moderator:

- **J. Philip Kirchner, Esq.**, Shareholder, Flaster Greenberg PC

When:

Thursday, June 5, 2014
11:30 a.m. Lunch and Networking
12:00 – 2:00 p.m. Program and Q&A

Location: Flaster Greenberg PC

1810 Chapel Ave. West
Cherry Hill, NJ 08002
RJF Conference Center, 2nd Floor

Wilmington Trust N.A. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have the final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.

ATTORNEYS MENTIONED

Steven Poulathas