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## The Use of Captive Insurance Companies in Business and Estate Planning

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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

*Continued*

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**Location: Flaster Greenberg PC**

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

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**ATTORNEYS MENTIONED**

J. Philip Kirchner

Steven Poulathas