



Wednesday, April 24, 2019

Registration: 12:00 p.m. • Program: 12:30 p.m. – 1:30 p.m.

Speakers:

Kevin J. Dykes

Life & Disability Insurance Specialist, *Capstone Partners Financial & Insurance Services, LLC*

Albert R. Kingan, JD, LL.M, CLU, ChFC

Assistant Vice President, *Estate and Business Planning, MassMutual Life Insurance Company*

Creative Buy-Sell Planning

This program is intended to provide a variety of important topics related to Buy-Sell Planning; to help the professional advisor understand the tax ramifications of the various alternatives, and to understand which alternatives might be work better in different situations. The other important objective of this presentation is to educate the advisor of alternatives that might work more effectively in complex situations. This presentation will help the professional advisor to understand how to structure and set up the Buy-Sell arrangement or how to structure alternative arrangements.

–Approved for 1.0 General CLE Credit–

OCBA Offices
 4101 Westerly Place
 Newport Beach, CA 92660
(Complimentary Parking)

Seating is limited, and lunch may not be available for purchase on the day of the meeting. Registration is not confirmed until payment is received. The OCBA is not responsible for lost, misdirected or delayed mail. Registration may not be transferrable; Certain conditions apply. Cancellations must be received in writing via fax or e-mail 3 business days prior to the meeting date to receive a refund. OCBA reserves the right to substitute speakers. This activity has been approved for MCLE credit by the State Bar of California in the amount of 1.0 hour(s), as appropriate to the content of the activity. OCBA is a State Bar of California approved MCLE provider and certifies that this activity conforms to the standards for approved education activities prescribed by the rules and regulations of the State Bar of California governing MCLE. Non-Attorney guests may attend with a registered attorney at equal rate. *Persons with Disabilities:* If special arrangements are required for attendance, please contact the OCBA at least 10 days prior to the event.

Register by fax, mail or online at www.ocbar.org

OCBA Business & Corporate Law Section Meeting – April 24, 2019

Meeting Price – After 4/19/19, Add \$10	Includes Lunch	Vegetarian Meal <input type="checkbox"/>	No Lunch
OCBA Business & Corporate Law Section Member	<input type="checkbox"/> \$25	<input type="checkbox"/>	<input type="checkbox"/> -0-
OCBA Attorney (Non-Section Member)	<input type="checkbox"/> \$50	<input type="checkbox"/>	<input type="checkbox"/> \$25
Non-OCBA Member Attorney	<input type="checkbox"/> \$60	<input type="checkbox"/>	<input type="checkbox"/> \$35

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