

2026 Advisor Symposium

Issues of Interest to Advisors Today



Steve Parrish, JD, RICP®, CLU®, ChFC®, AEP®

Professor of Practice & Scholar in Residence, The American College of Financial Services



Alan S. Gassman JD, LL.M., AEP®

Gassman, Denicolo & Ketron, P.A.



Kathleen W. Bilderback JD, LL.M.

Sandberg Phoenix



Allen Hensley CLU®, ChFC®, MSFS, AEP®

CVP, Advanced Agent Development Officer
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Please join me on November 4th from 2:00 to 5:00 PM Eastern

RSVP to Jodi King Parsons, Executive Benefits and Estates at Partner@ExecutiveBenefitsandEstates.Services

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Program agenda

Time (Eastern)	Presenter	Topic
2:00 - 2:05 pm	Sarah Frances Trampe	Welcome / Opening remarks
2:05 - 2:35 pm	**Steve Parrish**	**Wealth Transfer, Income Tax Planning & Family Succession**
2:35 - 2:50 pm	**Steve Parrish and Allen Hensley**	**Case Study #1 discussion: Tom and Linda Reynolds**
2:50 - 3:00 pm	*Break*	
3:00 - 3:30 pm	**Alan Gassman**	**Advanced Estate Planning in a Changing Environment**
3:30 - 3:50 pm	**Alan Gassman and Allen Hensley**	**Case Study #2 discussion: Robert and Susan Whitman**
3:50 - 4:00 pm	*Break*	
4:00 - 4:30 pm	**Kathleen Bilderback**	**Business Succession & Buy-Sell Planning**
4:30 - 4:50 pm	**Kathleen Bilderback and Allen Hensley**	**Case Study #3 discussion: SentinelPay Analytics**
4:50 - 4:55 pm	**Allen Hensley**	**Wrap up**
4:55 - 5:00 pm	Sarah Frances Trampe	Closing remarks / Adjourn

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