NAIFA ARIZONA

We want to take a moment to let you know how thankful we are for having you as a member. Follows is a program we invite you to attend as we close the year.

Benjamin Lavin
"Tax Law/Planning Updates/OBBBA'

Estate Planning that reflects a client's personal and business concerns.

Benji designs estate plans which allow high-net-worth individuals to leverage use of their gift, estate and generation-skipping transfer tax (GST) exemptions and to pass wealth to the next generation in a manner which is both tax efficient and creditor protected.

Daniel Timothy Schmaltz, CFP, BFA, CKA, CEPA
"Life Insurance Funding Strategies"
1 Hour CE pending
This course will examine and compare funding strategies for clients with large life insurance premiums. Six life insurance funding strategies will be explored.

Daniel teaches classes through the Financial Education Network at Chandler-Gilbert Community College and has been a finance lecturer at Grand Canyon University and ASU.

Program includes an **MDRT Panel** with: Gerald Wiebers, LACP; Amber Stitt, ChFC, CLTC, CLU and Barry McBride, CLU, AEP.

Luncheon also included as well as a tour of Junior Achievement facility.

November 6, 2025
9:00 a.m. - 9:30 a.m. Registration
9:30 a.m. - 12:30 p.m. Program and Lunch
Junior Achievement
636 W. Southern Avenue, Tempe 8282
No fee to attend - members encouraged to register a colleague
Due to cost of lunch - registered 'no shows' may be invoiced

Click here to Register

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