USES FOR LIFE INSURANCE BEYOND TAXES
MARY ANN MANCINI

Oftentimes, life insurance is only considered when there is a need to meet the estate tax burden. With the estate tax exemption so large at this time, many clients question the need for the policy, but wait! There are many reasons for continuing to hold a policy, even if there is no estate tax burden. This discussion will focus on the non-tax benefits life insurance provides and the best way to utilize the benefits as part of the client’s planning.”

Mary Ann Mancini is a Partner with the firm Loeb & Loeb LLP, located in Washington, DC. She represents high net worth families and individuals who reside in the United States and internationally. Her principle areas of practice are Trusts and Estates, Tax and Trust and Estate Litigation, Insurance Planning, the structuring and formation of entities, the creation of irrevocable “dynasty” trusts, tax planning for families and the entities they own, and the protection and preservation of their assets. Ms. Mancini has a B.A. from Washington College, a J.D. from The Catholic University of America, Columbus School of Law, and an LL.M. from Georgetown University. She is an ACTEC Fellow and an adjunct professor at Washington & Lee Law School.

There is continuing ed credit pending for this presentation. The program handouts are paperless. The handout will be available to download on the website (Document Library) a few days prior to each meeting. YOU may print the handout if you prefer to have a handout at the meeting.

Note: Paid membership dues do not include meals. To register for the meeting, complete the form below, enclose a check (payable to Dallas Estate Planning Council) for the respective amount (indicated below) and mail to: Dallas Estate Planning Council, P.O. Box 38553, Dallas, TX 75238-8553. You may register online with a credit card payment on the website: go to www.dallasepc.org, look for “Upcoming Events” on the left column and click on the date – Event Details, scroll down to the bottom of the page and register. LOG IN IS NOT REQUIRED TO REGISTER.
If you need a receipt, print out the confirmation page.

PREPAID MEALS: Members who have already paid in advance for all meetings for the year MUST register so we will have a count for the number of meals to prepare. PREPAID MEMBERS MUST REGISTER ON THE WEBSITE BY THE DEADLINE - go to www.dallasepc.org, look for “Upcoming Events” on the left column, click on the date for Event Details, scroll down to the bottom of the page and register.
THERE WILL BE 10 MEALS AVAILABLE FOR WALK-INS ON DAY OF MEETING (FIRST COME, FIRST SERVE). ALL OTHER WALK-INS WILL BE “PROGRAM ONLY”. CREDIT CARDS ARE NOT ACCEPTED AT THE DOOR, CASH OR CHECK ONLY. Member: $37 (includes meal and program); Guest: $60 (includes meal and program); *Member-Program Only: $25 (*ONLY MEMBERS may choose “program only” for $25; $20 - GUEST - Emerging Professionals – FIRST MEETING (includes meal/program-MUST be 40 years of age or younger or less than 5 years in respective discipline – MUST REGISTER BY THE DEADLINE)

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REMAINING DEPC SCHEDULE:

MAY 2: BREAKFAST/DOUBLETREE HILTON  
SPEAKER: Christine Wakeman  
TOPIC: Estate/Asset Protection Planning for Generation 2 in a Family Business

(Breakfast meetings are 7:30 a.m. – 9:00 a.m. and lunch meetings are Noon - 1:30 p.m.)