

7:30 - 8:00	Registration Continental Breakfast and Networking
8:00 - 8:15	Welcoming Remarks <ul style="list-style-type: none"> • Sindy Kong, Managing Partner Atlas Advisor Group
8:15 - 9:05	IRS Audits – Triggers and Traps <ul style="list-style-type: none"> • Aaron P Borden, Attorney Meadows Collier Reed Cousins Crouch & Ungerman, LLP
9:05 - 9:55	Flow of Funds Understanding the Legal Regulatory Traps for Cash Flow in Medical Practices <ul style="list-style-type: none"> • Bradford E. Adatto & Jay Reyero, Partners ByrdAdatto
9:55 - 10:10	Break
10:10 - 11:00	Business Succession and Estate Planning <ul style="list-style-type: none"> • James Atwood, Partner Atwood & McCall
11:00 - 11:50	Use a Cash Balance Plan to Help Your Client Enjoy the New Deduction <ul style="list-style-type: none"> • Sindy Kong, Managing Partner Atlas Advisors Group
11:50 - 12:35	Lunch
12:35 - 1:25	Powers of Deduction: Tax-Saving Strategies Under the Legislation Formerly Known as the Tax Cuts and Jobs Act <ul style="list-style-type: none"> • Thomas J. Pauloski, J.D., National Managing Director Alliance Bernstein L.P
1:25 - 2:25	Asset Protection in Texas <ul style="list-style-type: none"> • Victor McCall, Partner Atwood & McCall
2:25 - 3:25	A Dozen Life Insurance Tax Mistakes and Opportunities <ul style="list-style-type: none"> • Michael Amoia ,J.D., LLM (Tax),CLU, ChFC, Senior VP Crump
3:25 – 4:25	The Art of IRS Penalty Relief <ul style="list-style-type: none"> • Joel N Crouch, Managing Partner Meadow Collier Reed Cousins Crouch & Ungerman, LLP
4:25 - 4:35	Closing Remarks
4:35 - 5:30	Enjoy a Complimentary Networking Reception

Program Site: Lakewood Ballroom, Cityplace Conference Center, 2711 North Haskell, Dallas, TX 75204; Phone:(214)515-5100

Joel Crouch, Bradford E. Adatto, Jay D. Reyero, James Atwood, Thomas J. Pauloski, Victor McCall, Aaron Borden, Michael Amoia are not associated with AXA Advisors, LLC and is solely responsible for the content of these speakers presentation. AXA Advisors, LLC and its affiliates do not endorse or recommend the advice of these speakers companies/firms are not affiliated with AXA Advisors or AXA Network. Securities offered through AXA Advisors, LLC (NY, NY 212-314-4600), member FINRA, SIPC. Annuity and insurance products offered through AXA Network, LLC. AXA Network, LLC does business in California as AXA Network Insurance Agency of California, LLC and, in Utah, as AXA Network Insurance Agency of Utah, LLC. AXA Advisors and AXA Network do not provide tax or legal advice. Atlas Advisor Group is not owned or operated by AXA Advisors or AXA Network.GE-134628d (4/18)(exp 4/20)