

Estate Planning Council of North Texas

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Website: www.epcnt.org

BREAKFAST MEETING

WEDNESDAY, MAY 15, 2019

(Breakfast served 7:30-8:00 a.m., Program 8:00-9:00)

NOTE: MEETING LOCATION

GLENEAGLES COUNTRY CLUB (5401 West Park Blvd., Plano)

RESERVATION DEADLINE: WEDNESDAY, MAY 8, 5:00 p.m.

(PAYMENT MUST BE IN COUNCIL'S OFFICE BY WEDNESDAY, MAY 8)

LIFE INSURANCE BENEFICIARY DISPUTES



MICHAEL YOUNG

Sponsored by Merrill Lynch (The Maynard Group) and PlainsCapital Bank

The owner of a life insurance policy designates the beneficiary to receive the funds upon the insured's death. But there are numerous grounds for disputing payment of life insurance benefits. The presentation will review whether a given policy is governed by Texas or federal law and why that analysis is so important. Like wills, beneficiary designations can be attacked on the basis that they were the result of undue influence or that the owner lacked sufficient mental capacity to make or change a designation. Other common issues include attempted designations and marital property rights in life insurance proceeds. J. Michael Young is a civil litigation attorney at the Sherman firm of Sanders, Motley, Young & Gallardo. He has an active litigation practice in both state and federal courts. He has practiced for over twenty years, with a focus in the past decade on estate and life insurance beneficiary disputes. He has a finance degree from UT Austin and JD and MBA degrees from the University of Houston.

Continuing education credits approved for State Bar, CPA, CFP and Insurance.

Membership dues do not include meals. **Credit Cards are now accepted online at the website, www.epcnt.org**

Members who have already paid in advance for all meetings for the year MUST REGISTER ON THE WEBSITE (www.epcnt.org) so we will have a count for the number of meals to prepare.

THERE WILL BE 5 MEALS AVAILABLE FOR WALK-INS ON DAY OF MEETING (FIRST COME, FIRST SERVE). ALL OTHER WALK-INS WILL BE "PROGRAM ONLY". NOTE: WALK-IN PRICES ON DATE OF MEETING: Member: \$30 (includes meal); Guest: \$35 (includes meal); Program Only (no meal): \$20

To mail a check, **please complete this form, enclose a check (payable to Estate Planning Council of North Texas) and mail to: Estate Planning Council of North Texas, P. O. Box 38553, Dallas, TX 75238-8553.**

Member: \$25 (includes meal); Guest: \$30 (includes meal); Program Only (no meal): \$15

Name: _____ \$25 ___\$30 ___\$15

E-Mail: _____

Phone Number: _____

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