2026 PROFESSIONAL ADVISOR SYMPOSIUM

October 22, 2026 in Erie <u>and</u> November 5, 2026 in Pittsburgh
Ambassador Center, Erie, PA <u>and</u> Duquesne Club, Pittsburgh, PA
11:30 a.m. – 6:00 p.m.

KnoxLaw INSTITUTE

11:30am	**Registration**	
11:45am	**Lunch Buffet**	
12:00pm	**Welcome**	
12:15 – 1:15pm	**<u>Keynote</u>: How I Can Hack Into Your Organization: SOC and EDR Are Not Enough** ***AJ Hammond**, CRTL, OSCP, Lead Offensive Security Engineer, Praetorian Inc.* Your company has a Security Operations Center (SOC), you pay for enterprise endpoint detection & response (EDR), and it still might not be enough to protect your tech assets. AJ will review the attacker mindset and common tools and tactics hackers use to infiltrate organizations, steal data, and cause monetary loss for organizations of all sizes. Includes case studies detailing real world attack chains AJ has executed against Fortune 500 organizations.	
1:30pm – 3:45pm Breakout Sessions (choice of sessions for 1:30pm and 2:45pm)		
1:30 – 2:30pm	**#1 License to Plan: A Practitioner's Guide to Modern Trust Structures** *Kenzie P. Teel* This session offers a practical overview of the trust structures most used in modern estate planning: revocable trusts, irrevocable life insurance trusts, marital and credit shelter trusts, spousal lifetime access trusts, special needs trusts, Medicaid trusts, intentionally defective grantor trusts, and irrevocable non-grantor trusts. We will explore each structure's purpose, advantages, limitations, and ideal applications, along with strategies for wealth preservation, asset protection, tax planning, and multi-generational wealth transfer. Provides a broad understanding of how trusts can be used to achieve a variety of client planning objectives.	**#2 The Man with the Golden Handcuffs: Using Incentive Plans to Build an Ownership Culture** *Nadia A. Havard* Explore how strategic incentive plans can help key employees think and act like owners. This session examines three approaches, including non-qualified deferred compensation arrangements, designed to align employee interests with long-term business success. Attendees will learn planning strategies, common pitfalls to avoid, and frequent mistakes in administering non-qualified deferred compensation plans, along with practical solutions. The presentation will also highlight recent developments and case law, where applicable, to help advisors and business owners build a stronger ownership culture and retain top talent.
2:45 – 3:45pm	**#3 Plan Another Day: Medicaid and Asset Protection Strategies** *Kathryn A. Penick* Understanding long-term care planning can help advisors identify risks before they become crises. In this session, attendees will gain a practical overview of Medicaid eligibility, nursing home planning, and asset protection strategies available to clients and their families. We will explore common planning opportunities, including countable versus exempt assets, gifting rules, the look-back period, and proactive techniques designed to preserve wealth. Advisors will leave better equipped to address client concerns and collaborate with legal professionals to help clients navigate long-term care challenges with confidence.	**#4 No Time for Liability: How Different Entities Shield Owners and Assets** *Colleen D. Campbell and Stephen J. Jacobus* Are all business entity structures created equal? Certainly not! This session will provide an overview and comparison of business entity structures such as general partnerships, corporations, single-member and multi-member limited liability companies (LLCs), and limited partnerships (LPs). We will identify asset protection qualities of each structure and explore how they protect business assets, business ownership, and the personal assets of business owners in the event of unanticipated liability exposure events including a third-party claim, bankruptcy of an owner or the business, and/or divorce of an owner.
4 – 5pm	**25 Legal Tips in 50 Minutes: An Experiment in Brevity** *Jacqueline H. Brangard, Neal R. Devlin, Mitchell V. Perez, Brian M. Seelinger, and Jerome C. Wegley* Can our attorneys provide relevant legal information in 2 minutes or less? Never say never! This panel will offer tips on real estate, marital agreements, insurance policies & litigation, clients who need trust planning, and more.	
5 – 6pm	**Networking Reception**	