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IVAN ILLÁN GIVES KEYNOTE ADDRESS AT MASSMUTUAL TRUST COMPANY, FSB SYMPOSIUM

New York, NY (March 27, 2014) – Ivan Illán, CFS, Founder and Managing Partner at Aligne Wealth Preservation & Insurance Services, LLC, delivered the first keynote speech in New York to launch a series of the MassMutual Trust Company’s (“MMTC”) National Practice Management Symposiums. The audience included some of the top advisors within MassMutual Financial Group, seeking to better understand corporate trustee utilization, as a comprehensive wealth preservation partner, with their client families.

Illán’s lecture entitled, *Philanthropy: The Essential Tool in Family Wealth Stewardship*, provided a unique perspective on incorporating philanthropic planning into estate wealth preservation. By consolidating research from various industry and philanthropic leaders, his thesis highlights how financial services professionals can incorporate this subject to benefit families and their goals for wealth retention intergenerationally.

“Ivan has been a great resource with MassMutual Trust Company, having adopted trust and fiduciary services into his practice, and educating other advisors throughout MassMutual,” said Paul Abdow, National Sales Manager at MMTC, based in Enfield, CT.

The Symposiums are scheduled nationally at 5 events to be held in New York City, Boston, California, Central Pennsylvania & Southwestern US.

About Aligne Wealth Preservation & Insurance Services, LLC

With more than 300 families & corporate clients, and \$250 million assets serviced, the Aligne Wealth practice stewards estate planning advisors and their client families’ understanding of wealth, and its impact on future generations and the communities around them. Family Trustees and Corporate Plan Sponsors hire Aligne Wealth for transparent, conflict-free solutions, based on their partners’ exclusive industry perspective. Aligne Wealth offices are located in Los Angeles, New York, Newport Beach, Rhode Island, and South Florida. To learn more, visit www.alignewealth.com.

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