ALIGNE Wealth Preservation & Insurance Services, LLC

FOR IMMEDIATE RELEASE

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IVAN ILLÁN, FOUNDER AND MANAGING PARTNER OF ALIGNE WEALTH, ADDRESSES THE LOS ANGELES ESTATE PLANNING COUNCIL

LOS ANGELES, CA (January 29, 2014) – Ivan Illán, CFS, Founder and Managing Partner at Aligne Wealth Preservation & Insurance Services, LLC presented on the topic of *What is a Fiduciary Risk Audit and Why Should You Care?* to kick start the 2014 Los Angeles Estate Planning Council's (LAEPC) monthly membership meetings on Wednesday, January 22, 2014 at the City Club in downtown Los Angeles.

Financial Advisor, Michael J. Wegge, CFP®, at Capstone Partners Financial and Insurance Services, LLC, a General Agency of Massachusetts Mutual Life Insurance Company (MassMutual), served as LAEPC's Vice Chair and saw the value of including Illán in LAEPC's meeting. Wegge stated, "We invited Ivan because I detected he's one of those people whose greatest success is ahead of him and who's approach is shaking up our entrenched industry."

Illán shared the landscape of fiduciary oversight, and understanding the importance of conducting a fiduciary risk audit with a valued corporate trustee advisory practice. The presentation was highlighted with facts and figures of various US regulatory issues present today with the SEC, OCC, and FINRA. The audience of attorneys and estate planning advisors were illuminated as demonstrated by their questions.

Illán co-presented with The MassMutual Trust Company's Chief Fiduciary Officer, Debra Anderson, JD, LLM, whose presentation topic, *Drafting Issues from a Trustee's Perspective*, highlighted examples of poorly drafted provisions and the importance of receiving a full perspective of each family members' circumstances.

Illán graduated from Boston College with a B.S. in Finance and a B.A. in Philosophy. He also holds the Institute of Business and Finance's Certified Fund Specialist (CFS) designation. Illán's professional career began in 1996 with investment banking firm, Nuveen Investments, in Chicago. Then, in 2000, Illán founded (ming)Consulting Inc., an investment banking consultancy and in 2003 he served as Vice President at Fisher Investments. In 2005, he joined Capstone Partners Financial before forming Aligne Wealth.

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 and Rhode Island.

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