



A Lasting Legacy

Estate and Business Succession Planning

Stewart Van Duzer – Federated Insurance
Landon Long – Evans & Davis

CONVENTION EDUCATION

This session is eligible for 1 Continuing Education Hour.

For these hours to appear on your certificate, you must:

- Have your badge scanned at the door
- Attend 90% of this presentation
- Fill out the online evaluation for this session



Stewart Van Duzer

- First Vice President
Director of Special Projects: Risk Management
- Stewart's Federated career began in 1983 as a marketing development trainee. He was promoted up the ranks of marketing leadership and has held leadership roles in our Underwriting Department, Home Office Marketing, Personal Lines, Learning Center, Advertising, and Field Services.
- Stewart's primary focus is on risk management and our estate planning and business succession attorney network.



Landon C. Long

- Attorney and Partner with Evans & Davis, PLLC
- 20 estate & business planning attorneys on staff
- Evans & Davis has served over 2,400 Federated customers over 14 years





NECA PHILADELPHIA
SEPT 29-OCT 2, 2023

NECA CONVENTION EDUCATION

Evans & Davis is committed to providing estate planning, business planning, trust administration services, and probates on a personal level while building long-standing relationships with each of our clients and their families.



EVANS & DAVIS

ESTABLISHED
August 2002

Focus on Estate & Business Planning

OVER 20,000
INDIVIDUALS, FAMILIES AND BUSINESSES SERVED


45 TEAM MEMBERS

20 ATTORNEYS

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Our Focus



Estate Planning **Business Planning** **Trust Administration** **Probate & Ancillary Services**

NECA PHILADELPHIA SEPT 29-OCT 2, 2023

NECA CONVENTION EDUCATION

Where are you?

- 1 Do you have a plan?
- 2 Is it up to date?
- 3 Is it set up to be tax efficient?
- 4 Does your business have a plan?



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Questions?

Landon C. Long

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Thank You

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