



## **Topics/Speakers**

### **Employment Law and Updates – Ben Chapmen & Eric LaFleur, JD, LaFleur & Laborde, LLP**

General legal update exploring recent regulatory and jurisprudential actions relating to employee classifications, joint employers, white collar exemptions, post-employment restrictive covenants including non-competition, confidentiality and non-disparagement, Equal Employment Opportunity Commission and best practices regarding paid leave, harassment, accommodation and employee drug testing.

### **Closing the Gap: Strategizing Solutions to the Technician Shortage in Your Organization – Sean Fitzgerald, AED**

Join us for an insightful session exploring a universal challenge faced by equipment distributors: the pressing need for service technicians. Regardless of your organization's size, revenue, or location, this issue affects us all. In this session, participants will gain invaluable insights into the essential components of technician development and receive practical guidance on how to effectively address the shortage within their organization. Topics covered will include an examination of industry-recognized best practices in technician development, insights into state workforce initiatives, and a detailed analysis of the return on investment associated with investing in technician training and development. Don't miss this opportunity to equip yourself with the knowledge and strategies needed to tackle the technician shortage head-on.

### **Bolstering Your Organization's Cybersecurity Strategy – Rachel Wilson, Morgan Stanley**

As cybercrime continues to grow, businesses and individuals across the globe have firsthand witnessed the detrimental effects. To combat the latest cybersecurity threats, business leaders and their employees must play a key role in strengthening the protection of their most valuable assets and information. Please join Rachel Wilson, Head of Wealth Management Data Security and Infrastructure Risk at Morgan Stanley, as she shares her unique career journey, what you can do to continuously protect yourself, as well as advice on developing a resilient cybersecurity program in an ever-evolving cybersecurity landscape.

### **Succession Planning: Management and IRS Mitigation in Estate Planning For Closely Held Companies – Hilton Bell & Eric LaFleur, JD, LaFleur & Laborde, LLP**

The amount an individual can donate during lifetime or transfer at death without incurring a federal gift or estate tax (the unified credit amount) is currently \$13,610,000 per individual (\$27,220,000 for married couples) and the annual federal gift tax exclusion amount is \$18,000 per donee. However, on January 1, 2026, the unified credit amount will be reduced to approximately \$7,000,000 per individual (\$14,000,000 for married couples). This seminar will discuss closely held businesses (sole proprietorships, partnerships, corporations and limited liability companies) and the transfer of interest of the business to take advantage of the current unified credit amount prior to its decrease on January 1, 2026, including methods of transferring the business interest, joint marital donations, portability of the unified credit amount, restrictions on management, and valuation of the business, including discounts for lack of control and marketability. You will learn Best Practices in avoiding estate tax liability and mechanisms to provide for "generational" longevity of your business.

### **"Burn, Baby Burn" – Dean Rhoades, Federated Insurance**

From both a frequency and severity perspective, fire claims are quickly becoming a rapid problem for the insurance industry. The entire insurance industry has seen a dramatic uptick in fire claims. The industry is seeing more claims...and the dollar amounts for these losses are rapidly increasing. Yes, wildfires are part of the problem as well as a lack of upkeep on mechanical systems. However, one of the largest drivers of fire claims has been the dramatic increase in the usage of lithium batteries. Learn some "best practices" to help prevent fires at your business from Federated Insurance. This is a "hot" topic you do not want to miss.