

MANDALAY BAY
Traditional Premium Financing Conference
August 25th – 27th, 2009

Subject to Change

Tuesday, August 25	TIME	PRESENTATION	SPEAKER
	6:30 pm - 8:30 pm	Hosted Welcome Cocktail Reception - The Mix Lounge	
Wednesday, August 26	7:45 am - 8:45 am	Conference Check-in and Networking (Hosted Continental Breakfast)	
	8:45 am - 9:45 am	Opening Comments, Setting the Stage, Testimonial, and Positioning Premium Financing with Client	Julian Movsesian , President, CMS / SCA
	9:45 am - 10:15 am	Setting up a case for success - What works, what doesn't	Tim Whitmore, CLU, ChFC, BCE, CFS , Business Development, SCA
	10:15 am - 10:45 am	What Can and Has Gone Wrong: Best Practices	Bryan Schick, CPA , Advanced Sales, NFP Insurance Marketing Services
	10:45 am - 11:15 am	CMS Loan Programs and producer's liability in disclosure	Julian Movsesian , President, CMS / SCA
	11:15 am - 11:45 am	Creating Opportunities for Future Generations	Michael Babikian, JD, LL.M. , Senior Vice President, Transamerica
	11:45 am - 12:00 pm	Leveraging SCA Resources	Julie Johnston, MBA, FLMI , Business Development, SCA
	12:00 pm - 1:00 pm	LUNCH	
	1:00 pm - 1:30 pm	Jumbo Case Medical & Financial Underwriting	Susan Ghalili , Vice President, Life Underwriting Officer, John Hancock
	1:30 pm - 2:00 pm	Fixed UL and CMS using the Premium Skip Design to enhance the IRR	Mark Teitelbaum, JD, LL.M., CLU, ChFC , Vice President of Advanced Markets, AXA Distributors, Life Division
	2:00 pm - 3:00 pm	Charitable Lead Trust in combination with Asset Protection	Jeffrey M. Verdon, JD, LL.M. ,
	3:00 pm - 3:15 pm	BREAK	
	3:15 pm - 4:15 pm	Panel Discussion - Heavy Weight Bout, Carrier Sr. Management Vs Producers	Gary Hirschkron , Senior Vice President, AXA David Wilken , Senior Vice President, ING Mike Bell , Executive Vice President, Pacific Life Marty Flewellen , President, Transamerica Insurance and Investment Group Greg Mack , Senior Vice President Sales and Distribution, John Hancock
	4:15 pm - 5:30 pm	Actual Cases Funded - How to Design, Present, and Close Part I	Julian Movsesian , President, CMS / SCA
6:30 pm Cocktails / 7:30 pm - <u>HOSTED DINNER</u> and Winner of the \$2,000 playing chips drawing			

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Thursday, August 27

TIME	PRESENTATION	SPEAKER
8:00 am - 9:00 am	Networking (Hosted Continental Breakfast)	
9:00 am - 9:15 am	Opening Comments	Julian Movsesian, President, CMS / SCA
9:15 am - 10:45 am	Creating New Life Insurance Sales Opportunities	Jonathan Forster, JD, B.S. , Shareholder, National Chair Wealth Management Group and Co-Chair, Insurance Regulatory and Transactions, Greenberg Traurig Todd Steinberg , Partner - Greenberg Traurig
10:45 am - 11:15 am	Exit Strategies using Index UL and CMS	Chris Layeux, MBA, CLU, ChFC , Director of Premium Financing, ING
11:15 am - 11:45 pm	Pacific Life's enhanced Return of Premium Rider	Stephan Mitchell , Pacific Life
11:45 pm - 12:45 pm	LUNCH	
12:45 pm - 1:30 pm	Captives and Premium Financing	Tim Voorhees, JD, MBA
1:30 pm - 2:00 pm	CMS...An Alternative for Hardcore Termites	Mike Thaxton , Regional Sales Director, Transamerica
2:00 pm - 2:30 pm	Using Enhanced CSV to address a Collateral Shortfall	Doug Bowden, CLU, ChFC Director Advanced Case Design, Sun Life
2:30 pm - 2:45 pm	BREAK	
2:45 pm - 4:00 pm	Estate Planning Platforms using Premium Financing	Richard Falzalore MS, CFP® , Director of Estate Planning, SCA
4:00 pm - 5:15 pm	Actual Cases Funded - How to Design, Present, and Close Part II	Julian Movsesian , President, CMS / SCA
6:30 Cocktails / 7:30 pm - <u>HOSTED DINNER</u> , Closing Comments, and Winner of the \$2,000 playing chips drawing		