



1. **Retirement Planning After the New (2001) Tax Law**

John D. Bledsoe, CFP, CLU, ChFC, AEP

Discover how the 2001 Tax Law, which placed an increased emphasis on the need for individuals to plan their retirements, can benefit your practice.

2. **Recruiting & Retaining the Ideal Sales Assistant**

Liza Perdomo

Make your sales assistant an effective business partner by developing a job description that defines your expectations and attracts the right candidate.

Produced in conjunction with GAMA.

3. **Educational Funding After the 2001 Tax Act**

Philip J. Straub

Develop strategies to help your clients better understand the 2001 Tax Act, which changed the funding laws for college education.

4. **Long Term Care Insurance: The Niche in the Executive Marketplace**

Debra C. Newman, CLU, ChFC

Discover the benefits of Long Term Care Insurance and why you should prospect the executive marketplace.

Produced in conjunction with AHIA.

5. **The Role of Life Insurance in IRA Stretch-Out Planning**

John A. Oliver, CLU, ChFC

Understand why life insurance is an essential part of a successful IRA stretch-out plan and how to structure policy ownership for maximum value.

6. **Understanding Opportunities for Financial Advising in the Multiline Environment**

Robin C. Mueller, LUTCF

Maximize revenue, account penetration and client retention by segmenting your market and offering a variety of life insurance and financial products.

7. **Business Insurance for Pass-Through Entities**

Terri Getman, JD, CLU, ChFC

Marie Boric, CPA, MT, CFP, CLU, ChFC

Establish buy-sell arrangements that preserve the control and value of a business at the death, disability or retirement of an owner. Part I: *Buy-Sell Planning with S Corporations*. Part II: *Partnerships & Limited Liability Companies*.

8. **Voluntary Worksite Benefits: A Comprehensive Guide**

Susan C. Bianco, CLU

Increase your profit potential by incorporating the strategies of voluntary worksite benefits. Learn how to identify prospects, select products/carriers, choose proper delivery systems and understand enrollment processes.

9. **The Do Not Call Opportunity**

Bill Cates, CSP

People want to meet you the old-fashioned way—through an introduction. Develop a template for building a successful referral-based business.

10. **Use Estate Planning to Improve Your Bottom Line**

David A. Straus, LLM, CPA

Estate planning provides a valuable client service while improving your bottom line. Gain helpful ideas for incorporating this service into your practice.

11. **Improve Your Bottom Line Using LIFE's Products**

Produced by NAIFA and LIFE

Strengthen existing client relationships by incorporating LIFE products—print, video and online resources—into your sales and marketing efforts.

Sponsored by SFSP.

12. **Asset Allocation: Putting Your Client's Eggs in the Right Baskets**

Paul Reavis, RFC, CLTC, LUTCF

Develop strategies to help your clients better understand asset allocation principles and concepts. Gain insight into risk/reward, asset classes, modern portfolio theory and more.

13. **Successful Life Insurance Selling in a Multiline Agency**

Matthew Tobben

Challenge your staff to be a valued resource for your clients by building effective staff/client relationships.

14. **Maximizing Health Savings Accounts Opportunities**

Dick Harlow, CLU, CSA, CBC

Discover everything there is to know about Health Savings Accounts: family coverage, contributions and discrimination rules, qualified expenses and distributions and more.

15. **Values & Ethics: Being Compliant & Profitable**

David F. Woods, CLU, ChFC, LUTCF, NAIFA CEO

Brian K. Atchinson, JD, IMSA Exec. Director

Ethical behavior benefits consumers, agents and companies. Discover how you can put ethics into practice by creating your own code of ethics.

16. **Protecting Your Client's Business**

Panel Discussion

Four prominent business insurance specialists discuss various aspects of key-person insurance, buy-sell agreements, health insurance, disability insurance and retirement plans.

Produced in conjunction with LIFE.

17. **Survive and Thrive in Your First Three Years**

Jarred Elmar

Develop strategies for overcoming the challenges of building a successful career in the insurance and financial services industry—prospecting, lead generation, appointments, presentations, follow-up and referrals.

Produced in conjunction with YAT.

18. **Marketing Consumer-Driven Health Plans**

Lawrence E. Lounds, CLU, ChFC

Understand the design issues to consider when recommending a consumer-driven health plan. Includes a description/comparison of several plans (HSA, HRA & FSA) combined with High Deductible Health Plans.

Produced in conjunction with AHIA.

19. **Making the Suitable Sale: NASD Requirements for Variable Annuities**

Panel Discussion

Four prominent industry representatives speak from each of their distinct perspectives and provide a balanced view of the opportunities and challenges for financial advisors who sell variable annuities.

Produced in conjunction with SFSP.

20. **Back to Basics: The Middle Market**

Panel Discussion

Understand the critical relationship between life insurance and client motivation. Refine your approach and learn how to translate numerical values into terms your clients can easily understand.

Produced in conjunction with SFSP.