

THE ADVANCED PREMIUM FINANCING CONFERENCE

The Mandalay Bay Resort & Casino, THEhotel

August 14th – 16th, 2012

Time	Topic/Function	Speaker
<u>Tuesday, August 14th</u>		
All Day	Arrivals	
6:00pm – 8:30pm	Welcome Reception	MIX Lounge
<u>Wednesday, August 15th</u>		
<i>Meetings will be held at The Mandalay Bay Resort & Casino, Islander E Room.</i>		
8:00am – 9:00am	Continental Breakfast	Islander I Room
9:00am – 9:15am	Welcome Remarks	Mike Bell - Executive Vice President, Life Insurance Division, Pacific Life Insurance Company Julian Movsesian, MBA – President & Founder, CMS & Succession Capital Alliance
9:15am – 10:00am	Succession Capital Alliance – Proven Process to Increase Sales	Brian Whitmore – Vice President, Succession Capital Alliance Michael Rothman, CFP – Succession Capital Alliance Julie Mirza MBA, CLU, FLMI – Director of Private Client Group, Succession Capital Alliance
10:00am – 11:00am	Index Universal Life – How Does PL Stack Up?	Stephan Mitchell – IUL Product Marketing Specialist, Pacific Life Insurance Company
11:00am – 12:00pm	HYCET Trust – Have Your Cake and Eat it Too!	Jeff Verdon, JD, LLM – Jeffery M. Verdon Law Group, LLC
12:00pm – 1:00pm	Lunch	Islander I Room
1:00pm – 1:45pm	The IDEAL Plan – All Your Concerns Into One Solution	Craig Sullivan, JD – Independent Attorney
1:45pm – 2:30pm	Captive Insurance Company Strategies In Connection With Life Insurance	Fred Turner – Founding Principal, Active Captive
2:30pm – 2:45pm	Break	
2:45pm – 3:15pm	Success Stories – Working with SCA	Evan Ohs – Regional VP, Pacific Northwest region

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Wednesday, August 15th - Continued

3:15pm – 5:00pm	Actual Case Studies – Sharing Ideas That Will Increase Your Life Sales in the High Net Worth Market Place	Julian Movsesian, MBA – President & Founder, CMS & Succession Capital Alliance Scott McVicker, CPA – Succession Capital Alliance
5:00pm	Survey Collection	Drawing for \$500 of Playing Chips
6:00pm – 7:00pm	Cocktail Reception	Islander I Room
7:00pm	Dinner – Fact Finder Submission - \$1000 of Playing Chips Awarded to Winner	Islander I Room
9:00pm	Poker Tournament Casino Floor Poker Room	Succession Capital Alliance’s 4 th Annual Tournament

Thursday, August 16th

Meetings will be held at The Mandalay Bay Resort & Casino, Islander E Room.

8:00am – 9:00am	Continental Breakfast	Islander I Room
9:00am – 9:30am	Opening Comments	Khanh Tran - President, Pacific Life Insurance Company
9:30am – 10:30am	The SCA Process – From Fact Finder to Presentation	Michael Rothman – Director of Institutional Alliances, Succession Capital Alliance
10:30am – 11:30am	Asset Protection and Integrated Estate Planning – You’ve Earned It, Now Protect It!	Barry Engel, ESQ – Founding Principal, Engel & Reiman
11:30am – 11:45am	Break	
11:45pm – 12:30pm	Creative Case Designs & Wrapping It Up	Julian Movsesian, MBA – President & Founder, CMS & Succession Capital Alliance
12:30pm	Survey Collection	Drawing for \$500 of Playing Chips
Afternoon	Departures	

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