



Where financial plans meet sparkling sands.

Key Takeaways:

- 2 days worth of insurance-related education
 - 12 CFP CE® credits

Key Ingredients:

- Expert speakers & facilitators
 - Interactive Sessions
 - Case Studies
 - Networking

Agenda

Wednesday, February 1

6:00-8:00 pm Meet, Greet & Eat

Join us at the Sheraton Sand Key poolside grass for heavy hors d'oeuvres, cocktails & mingling with other attendees and the LLIS team

Thursday, February 2

	<u>Session</u>	<u>Topic</u>	<u>Leader</u>
8:00-8:30	Continental breakfast		
8:30-9:00	Welcome		Mark Maurer, CFP® President & CEO
9:00-10:00	DI Protection: Not just for the beach, but income too!	Disability insurance	Kathy Bilodeau, Disability Specialist
10:00-10:15	Break		
10:15-11:15	Dive Deeper into Disability Claims	Disability claims	Aidan Kavanagh
11:15-11:30	Break		
11:30-12:30 pm	Don't Worry, Beach Happy with Term	Term insurance	Brian Ciccarelli, Term Specialist
12:30-1:30	Lunch		
1:30-2:15	Navigating the Waters of Annual Statements & Illustrations and Other Benefits of Fixed Life Policies (Part 1)	Annual Statements & Illustrations	Mark Maurer, CFP® President & CEO
2:15-2:30	Break		
2:30-3:15	Navigating the Waters of Annual Statements & Illustrations and Other Benefits of Fixed Life Policies (Part 2)	Annual Statements & Illustrations	Mark Maurer, CFP® President & CEO
3:15-3:30	Break		
3:30-4:30	How to make the Underwriting Process a Walk on the Beach	Underwriting	Jennifer Stiles, Supervisor of New Business
4:30-4:45	Break		
4:45-5:45	Interactive Solution Solving	DI, Term & Underwriting	

Friday, February 3

	<u>Session</u>	<u>Topic</u>	<u>Leader</u>
8:00-8:45 am	Breakfast-on-your-own vouchers (Sheraton guests only)		
8:45-9:00	Welcome Back		Mark Maurer, CFP® President & CEO
9:00-10:00	High Tide or Low Tide, LTCi is on Your Side	Long Term Care insurance	Jill MacNeil Long Term Care Specialist
10:00-10:15	Break		
10:15-11:15	Smooth Sailing through LTC Underwriting	Long Term Care underwriting	Allen Gregoire AHIP, LTCP Jackie Slaughter, CLTC
11:15-11:30	Break		
11:30-12:15	Keep the Good Times Rolling into Retirement with Hybrids (part 1)	Hybrid Life/LTCi & Hybrid Annuity/LTCi	Jerry Skapyak, LUTCF, Annuities Specialist
12:15-1:15 pm	Lunch		
1:15-2:00	Keep the Good Times Rolling into Retirement with Hybrids (part 2)	Hybrid Life/LTCi & Hybrid Annuity/LTCi	Jerry Skapyak, LUTCF, Annuities Specialist
2:00-2:15	Break		
2:15-3:15	The Shifting Sands of Policyholder Services	Policyholder Services Panel	Mark Maurer, CFP® Ashley Greenfield Claudia Molina
3:15-3:30	Break		
3:30-4:30	Interactive Solution Solving	LTC, Hybrids & Policyholder Services	

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