



INSURANCE IN YOUR HEAD. SAND IN YOUR TOES.

- 🌿 2 days of insurance-related education
- 🌿 12 CFP CE® credits (pending approval)
 - 🌿 Expert speakers & facilitators
 - 🌿 Networking & knowledge-sharing

Preliminary Agenda

Wednesday, February 20

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

Join us at the hotel's beach tent for heavy hors d'oeuvres, cocktails & mingling with other attendees and teamLLIS

Thursday, February 21

	<u>Session</u>	<u>Topic</u>	<u>Leader</u>
8:00-8:30 am	Continental breakfast/Welcome remarks (8:15 am)		Mark Maurer, CFP® President & CEO
8:30-9:30 am	Setting SAIL with Super Acronyms for Insurance Learning	Insurance Acronyms	Mark Maurer, CFP® President & CEO
9:30-9:45 am	Break		
9:45-10:45 am	Positive ripples of life insurance (Life settlements & charitable giving)	Life settlements	Judith Maurer Founder
10:45-11:00 am	Break		
11:00-12:00 pm	Navigating life insurance claims into clear waters	Life insurance claims	Justin Payne, AVP – Claims Columbus Life Insurance Company
12:00-1:00 pm	Lunch		
1:00-2:00 pm	Let's dive deep into the details of an insurance exam	Life underwriting	Jennifer Stiles, ALU, FLMI Supervisor New Business
2:00-2:15 pm	Break		
2:15-3:15 pm	Life's a Beach! (and insurance is in reach)	Annuities and life insurance reviews	Mark Maurer, CFP® President & CEO
3:15-3:30 pm	Break		
3:30-4:30 pm	Ocean advice: from advisors, for advisors	Interactive Solutions Session	
Group Dinners (optional)			

Friday, February 22

	<u>Session</u>	<u>Topic</u>	<u>Leader</u>
	Breakfast-on-your-own vouchers (Sheraton guests only)		
8:15-8:30 am	Welcome Back		Mark Maurer, CFP® President & CEO
8:30-9:30 am	Breeze through LTCi underwriting	Long Term Care insurance (LTCi) underwriting	Allen Gregoire & Jackie Slaughter Mutual of Omaha
9:30-9:45 am	Break		
9:45-10:45 am	Ride the silver wave of opportunity	LTCi	Jill MacNeil Long Term Care Specialist
10:45-11:00 am	Break		
11:00-12:00 pm	Hybrids: Making waves in the LTCi industry	Hybrid Life/LTCi & Hybrid Annuity/LTCi	Jerry Skapyak, LUTCF Annuities Specialist
12:00-1:00 pm	Lunch		
1:00-2:00 pm	Life Preserver, Keeping your Clients Income Afloat	Individual Disability Insurance (DI)	Brian Ciccarelli DI Specialist
2:00-2:15	Break		
2:15-3:15	The Lifeguard keeping watch over your business	Business DI	Kathy Bilodeau DI Specialist
3:15-3:30	Break		
3:30-4:30	Advisor Feud: Insurance Style	Interactive Solutions Session	Mark Maurer, CFP® President & CEO

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