



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

Preliminary Agenda

Wednesday, February 26

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 27

	<u>Session</u>	<u>Leader</u>
7:30-8:15 am	Continental breakfast/Welcome remarks (8:00 am)	Mark Maurer, CFP® President & CEO
8:15-9:15 am	Life Insurance	Mark Maurer, CFP® President & CEO
9:15-9:30 am	Break	
9:30-10:30 am	Life Insurance Underwriting (UW)	Shannon Keller, FALU, FLMI, Director & Asst. Chief Underwriter
10:30-10:45 am	Break	
10:45-11:45 pm	Life insurance application process	Jennifer Stiles, ALU, FLMI Supervisor New Business
11:45-12:45 pm	lunch	
12:45-1:45 pm	Disability Insurance (DI) UW	Jeff Hannemann Principal Financial
1:45-2:00 pm	Break	
2:00-3:00 pm	Individual DI	Brian Ciccarelli DI Specialist
3:00-3:30 pm	Break	
3:30 – 4:30	Interactive Learning Session	

Friday, February 28

	<u>Session</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	Long Term Care insurance (LTCi) & Hybrids	Jill MacNeil & Jerry Skapyak LTC Specialist Annuity/Hybrids Specialist
9:30-9:45 am	Break	
9:45-10:45 am	LTCi Claims	Therese McDermott Supervisor in Claims, Mutual of Omaha
10:45-11:00 am	Break	
11:00-12:00 pm	Annuities	Jerry Skapyak, LUTCF Annuity/Hybrids Specialist
12:00-1:00 pm	Lunch	
1:00-2:00 pm	Business DI	Kathy Bilodeau DI Specialist
2:00-2:15 pm	Break	
2:15-3:15 pm	Policyholder Services & FIO Process	Mark Maurer, CFP® & Taylor West

11 CFP® CE credits (pending approval)