

# EVENT AGENDA

## XIV ANNUAL ADVISORS CONFERENCE

VDARA HOTEL & SPA | 2600 W. HARMON AVE., LAS VEGAS, NV 89158

# DAY 1

SUNDAY | OCTOBER 21<sup>ST</sup>

GENERAL SESSION BEGINS | ALL ATTENDEES  
VINOLY GRAND BALLROOM



- |             |   |
|-------------|---|
| 2:00–4:00PM | <b>Sponsor Presentations – Members Only</b>   |
| 4:00–4:10PM | <b>Welcome – Opening Remarks</b><br><i>Jordon Katz   2018-2019 Vice President, The McGehee Group, Inc.</i>  |
| 4:10–5:10PM | <b>How Perfect Do We Want our World to Be?</b><br><i>Simon Winchester   Award-Winning Author of The Perfectionists</i>                                      |
| 5:10–6:00PM | <b>The Outlook for the Economy and Financial Markets in 2019</b><br><i>David W. Berson, Ph.D.   Senior Vice President &amp; Chief Economist, Nationwide</i> |
| 6:00–6:45PM | <b>Private Reception – Silk Road</b>  |
| 6:45PM      | <b>OPEN NIGHT – Sponsored and Individual Dinners</b>  |

# DAY 2

MONDAY | OCTOBER 22<sup>ND</sup>

GENERAL SESSION BEGINS | ALL ATTENDEES  
VINOLY GRAND BALLROOM



- 7:30–8:30AM**      **BREAKFAST – Silk Road**
- 8:30–9:15AM**      **678 Trusts - BDIT**  
*Marvin E. Blum, J.D., C.P.A.* | Founder and Managing Partner, The Blum Firm, P.C.
- 9:15–9:45AM**      **Life Settlement Opportunities in the New Tax Environment**  
*Jamie Mendelsohn* | Executive Vice President, The Ashar Group
- 9:45–10:30AM**      **AALU – Washington Update** *courtesy of AALU*  
*Ken Kies* | Managing Director, Federal Policy Group, LLC.
- 10:30–10:45AM**      **BREAK**
- 10:45–11:30AM**      **McGehee Group Member Presentations “TED Talks” Part 1 – Things Every Advisor Should Know**  
*Bruce Udell* | *Per Stirpes vs. Per Capita*  
*Stuart Youngentob* | *Guaranteed Issue Term Life and Disability - Solutions for Businesses and their High Earning Executives*
- 11:30–12:15PM**      **LUNCH – Silk Road**
- 12:15–12:30PM**      **Welcome and State of the Union of NFP**  
*Mike James* | President, NFP Insurance Services and PartnersFinancial
- 12:30–12:45PM**      **Private Placement Insurance Products in the International Market Place**  
*Sam Radin* | McGehee Group Member – National Madison Group

- 12:45–1:30PM**      **Seeking Wealth Preservation through Planning with Private Placement**  
*Ann Marie Liotta, CPA* | US Director of Wealth Structuring Services, Lombard International  
*Casey Abbott* | Managing Director, Agency Distribution, Lombard International
- 1:30–2:15PM**      **Life, Love and Legacy: Hitting Your Legacy Home Run**  
*Phil Cubeta* | American College, Charter
- 2:15–3:00PM**      **Dynamic Planning Strategies for the Conscientious Planner**  
*Alan S. Gassman, JD LL.M.* | Clearwater, Florida
- 3:00–3:30PM**      **How Changing Interest Rates and Equity Markets Impact Life Insurance Portfolios and Clients**  
*David M. O'Malley, President and Chief Operating Officer* | Penn Mutual
- 3:30PM**      ----- END OF CONTENT FOR THE DAY -----
- 4:00–7:00PM**      **Optional Group Activity Open to all Attendees**  
TOP GOLF
- 6:45PM**      **Open Night** *Sponsored and Individual Dinners*

\*Agenda subject to change



# DAY 3

TUESDAY | OCTOBER 23<sup>RD</sup>

GENERAL SESSION BEGINS | ALL ATTENDEES  
VINOLY GRAND BALLROOM



7:30–8:30AM **BREAKFAST – Silk Road**

8:30–9:30AM **Planning Under 199A for Business Entities – Everything the Financial Advisor Needs to Know**

*Robert S. Keebler | CPA/PFS, MST, AEP (Distinguished), CGMA, Keebler & Associates, LLP.*

**Open Forum – Question & Answers**

9:30–10:30AM **Collaboration Case Studies with Guest Advisors  
Most Unique experience using Life Insurance**

*Moderated by Eamon Walsh | McGehee Group Member  
Guest Advisors to Be Named...*

10:30–11:00AM **End of Meeting**

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