

AGENDA

saturday
OCTOBER 11TH

ALL DAY

Early Bird Arrivals

sunday
OCTOBER 12TH

2:00 – 5:30 PM

Board Meeting – to be confirmed
Zeno Boardroom 4803

3:00 – 5:00 PM

Registration Reception
Stop by the registration desk to pick up your welcome kit, say hello to the staff and catch up with fellow members!
Lando 4301A

6:00 – 7:00 PM

FFR Welcome Cocktail Reception
Kick off the Fall Meeting at the Welcome Reception. Enjoy cocktails with your FFR Partners, Carrier Representatives and FFR Staff
Lando 4303 & 4304

7:00 – 10:00 PM

Carrier Networking Dinners
(Off Site)

First Financial Resources

THE SALES IDEAS AND CONCEPTS PRESENTED ARE THOSE OF THE CARRIERS AND PRESENTERS AND ARE NOT ENDORSED BY OR REFLECT THE POSITION OF NEW FIRST FINANCIAL RESOURCES, LLC.

monday

OCTOBER 13TH

- 7:30 – 8:30 AM **Breakfast**
Lando 4203-4205
- 8:30 – 8:45 AM **Opening Remarks**
Tom Tous
Lando 4201AB & 4301AB – General Session
- 8:45 – 9:15 AM **“Blue Prints for Tomorrow” – Pacific Life – Platinum Sponsor**
Nate Sachs, Founder and Owner of Blue Prints for Tomorrow

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- 9:15 – 9:45 AM **“Underwriting and Common Impairments”**
Dr. Jack Cotlar, FFR Medical Director, Strategic Medical Consulting, Inc.

Gain insight into the fundamentals of underwriting as related to the top impairments seen in the insurance industry today. A case review will demonstrate these underwriting principals at work!
- 9:45 – 10:00 AM **“Title TBD” – ING Life Design – Gold Sponsor**
Dave Wilken, Senior Vice-President with Principal TBD

Xxx
- 10:00 – 10:30 AM **Break – Sponsored by Lincoln Financial Group**
Lando 4203-4205
- 10:30 – 10:45 AM **Hear from your Board Member Nominees!**

Candidates have an opportunity to campaign, sharing with you their goals and directives as an FFR Board Member for 2009.
- 10:45 – 12:00 PM **“Title TBD” - Guest Speaker**
Bob Ritter, President - InsMark

xxx
- 12:00 – 1:00 PM **Lunch**
Lando 4303-4304
- 1:00 – 2:00 PM **“AIG Elite Global Index” - Guest Speaker**
John McSwaney, President – McSwaney & Associates Consulting, Inc. with FFR Principal, Jim Menighan and KOP, Kathleen Wilson

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- 2:00 – 2:30 PM **Platinum Sponsor – Transamerica/Summit Alliance**
Jim Bowman, President and Mike Thaxton, TITLE

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- 2:30 – 2:45 PM **Break**
Lando 4203-4205
- 2:45 – 3:00 PM **Hear from your Board Member Nominees!**
Candidates have an opportunity to campaign, sharing with you their goals and directives as an FFR Board Member for 2009.
- 3:00 – 3:15 PM **“Title TBD” Gold Sponsor – Herman Agency – Gold Sponsor**
Larry Herman, President with FFR Principal TBD

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- 3:15 – 4:15 PM **“Fast and Furious” – FFR “Idol” Competition – Hosted by FFR Principal, Stuffy Singer**
Ten Principals share their marketing ideas in 4 minutes or less! Learn from the “best of the best!” Let the competition begin! 1st, 2nd, and 3rd prizes will be awarded to the Top 3 Presenters.

FFR Principals who don’t compete for the title of the first ever FFR “Idol” can get in touch with their inner Simon, Paula or Randy! YOU be the judge!
- 6:00 – 7:00 PM **FFR Cocktail Reception**
Madame Tussauds Museum – The Venetian Hotel~Resort~Casino
- 7:00 – 10:00 PM **Carrier Networking Dinners**
Off Site

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tuesday

OCTOBER 14TH

7:30 – 8:30 AM

Breakfast
Lando 4203-4205

8:30 – 9:45 AM

“Legislative Trends and Sales Ideas” - Guest Speaker
Thomas Handler, Attorney – Handler, Thayer & Duggan
Lando 4201AB & 4301AB – General Session

Xxx

9:45 – 10:15 AM

“The Future of Institutionally-priced Life Insurance (ILI)” – Guest Speaker
Mark Whitelaw, President – Valley View Consultants, Inc.

10:15 – 10:30 AM

“Capital Markets and Life Insurance” – AXA – Gold Sponsor
Mark Teitelbaum, Vice-President – Advanced Markets and Communications

What is driving the sales of life insurance on the secondary market? Learn about these factors as well as the issues surrounding purchasers of policies.

10:30 – 11:00 AM

Break
Lando 4203-4205

11:00 – 11:30 AM

“New Turn-key Premium Financing Program” - AVIVA – Platinum Sponsor
Chuck VanDevander, Senior Vice-President

Xxx

11:30 – 11:45 AM

“Title TBD” – Credit Suisse – Gold Sponsor
Speaker TBD

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11:45 – 1:00 PM

Lunch
Lando 4303-4304

1:00 – 1:15 PM

“Title TBD” - West Coast Life – Gold Sponsor
Rose Presti AVP-Sales and Marketing and Shirley Mitchell, TITLE

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1:15 – 1:45 PM

“Title TBD” - American General – Platinum Sponsor
Dennis Roberts, President

xxx

1:45 – 2:00 PM

“Title TBD” – Mass Mutual – Gold Sponsor
Bob King, Brokerage Director

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2:00 – 2:30 PM

Break
Lando 4203-4205

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2:30 – 3:00 PM

“Title TBD” - Advanced Planning Services, Inc. – *Platinum Sponsor*
Mike Rodman, President

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3:00 – 3:15 PM

“Title TBD” - National Life – *Gold Sponsor*
Elizabeth Campbell, Regional Vice-President

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3:15 – 4:15 PM

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Lando 4303 & 4304

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wednesday

OCTOBER 15TH

Members Only – Closed Session

7:30 – 8:30 AM

Breakfast

Lando 4203-4205

8:30 – 10:15 AM

Members Only Meeting (Closed Session – Principals Only - General Session)

Topics TBD

Lando 4201AB & 4301AB – General Session

10:15 – 10:30 AM

Break

Lando 4203-4205

10:30 – 11:30 AM

Members Only Meeting Continued (Closed Session – Principals Only – General Session)

11:30 – 11:45 AM

Closing Remarks

Tom Tous

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