2019 Race for Success Schedule

Tuesday | April 23, 2019 | 8:00 am - 6:00 pm | Hella Auditorium

8:00 - 9:00 am — REGISTRATION OPENS | CONTINENTAL BREAKFAST | EXHIBITS OPEN

9:00 - 10:00 am
TDI# 6501 approved
CFP# 200272

HOUR #1 – Provider #32670 – Jackson National Life
Chris Palladino, CFP, ChFC and **Jackson National Life** present
"Transfer, Taxes, and Turmoil: The Importance of Annuity Titling" *(CLU/ChFC, CFP approved)*

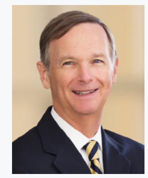
This class discusses the importance of annuity titling. Proper annuity titling is very easy to overlook and neglecting it can have grave consequences. This presentation reviews the ownership of annuities by individuals, entities, and trusts as well as many common pitfalls that you may encounter through incorrect titling.

10:00 - 10:15 am — BREAK | VISIT WITH EXHIBITORS

10:15 - 11:15 am
TDI# ______

HOUR #2 – Provider #155882 – Barnes & Thornburg, LLP
Jim Browne, CPA and **Barnes & Thornburg** present
"Tax Incentives for Opportunity Zones"

This course will review the tax incentives and investment and structuring issues associated with Qualified Opportunity Funds. Opportunity Zones were created by the 2017 Tax Cuts and Jobs Act with the intent of rewarding investors for moving capital gains into long-term investment in low income areas. Advisors will learn how investors will be impacted by this new program.



11:15 - 11:30 am — BREAK | VISIT WITH EXHIBITORS

11:30 am - 12:30 pm
TDI# 118331 approved

HOUR #3 – Provider #33510 – The DI Center
A. Andra Grava, CLU, RHU and **The DI Center** present
"Language Matters – Income Replacement Real Life Stories"

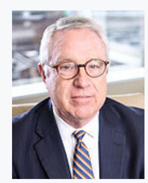
Disability Income Insurance has gone by many names, but no matter what you call it, it's most important to know that it helps prevent financial disaster when someone becomes too sick or hurt to work. Learn the three parts of a DI contract, why how you describe them matters, and how they're used by carriers to replace your clients' incomes. Real life claims will be shared to highlight that policy language is key, but that understanding how claims are processed and paid can make all the difference.

12:30 - 1:30 pm — LUNCH | VISIT WITH EXHIBITORS

1:30 - 2:30 pm
TDI# 96882 approved

HOUR #4 – Provider #32404 – MassMutual
Nick Harrison and **MassMutual** present
"Intro to Business Insurance" *(CPA/CPE, CFP approved)*

This presentation will focus on the purpose of and the need for business insurance. You will learn how life insurance can help employee benefit planning to recruit, retain, and reward employees. Also, you will learn succession planning for business owners, and the choices available to transfer the business.



2:30 - 2:45 pm — BREAK | VISIT WITH EXHIBITORS

2:45 - 3:45 pm
TDI# ______

HOUR #5 – Provider #32331 – National Association of Insurance and Financial Advisors-Texas
Shelley Giordano and **Retirement Funding Solutions** present
"Why Advisors Are Increasingly Discussing Reverse Mortgage in Retirement Planning"

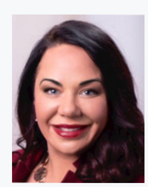
As clients are approaching retirement, they are finding their 401(k), savings, annuities, and cash value in the insurance policies may not be adequate. Clients are now using their housing assets along with their other retirement assets to improve outcomes. Understanding how to properly use the housing asset as well as the rules and regulation regarding the use of this asset will be discussed.

3:45 - 4:00 pm — BREAK | VISIT WITH EXHIBITORS

4:00 - 5:00 pm
TDI# 99994 approved

HOUR #6 – Provider #32499 – Lincoln Financial Group/MoneyGuard
Carolyn Burges, CLTC and **MoneyGuard** present
"The A–Z of LTC" *(CLU/ChFC, CFP, CPA approved)*

One of the most overlooked risks of retirement is the cost of long-term care. That's because most people don't expect to need long-term care – and its cost can quickly drain their retirement savings. The key to successful long-term care planning is being prepared for the likelihood that many of your clients will need it. Upon conclusion of this course, the advisor should be well-equipped to have the long-term care discussion and put a specific client strategy in place.



5:00 - 6:00 pm — SOCIAL | SPONSOR AND NAIFA PRIZE DRAWINGS

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