

2013 Joint Symposium Agenda

Atlanta Chapter Society of Financial Service Professionals (Atlanta FSP)
& Estate Planning Council of North Georgia (EPCNGA)

August 22, 2013

7:00-7:45am	Registration, CE Sign-In, Breakfast w/Sponsors
7:45-8:00am	Welcome, Pledge, Announcements, FSP Sponsors (<i>Signature: Nationwide, Prudential; Platinum: Lefkoff, Duncan, Grimes, McSwain & Hass; Silver: John Hancock, Milner Atlanta, Portamedic, Guardian/Mathis, Hill, Robertson</i>)
8:00-9:00am 1 hr. GA Ins./CFP/CLE	Regulatory & Legislative Update: Brendan Gleason, Director of Political Advocacy, AALU (<i>1 hour GA Insur. ethics</i>)
9:00-10:00am 1 hr. GA Ins./CFP/CLE	ATRA 2012: What Should Clients Do Now? Richard Morgan, JD; Morgan & DiSalvo
10:00-10:15am	Break with Sponsors
10:15-11:15am 1 hr. GA Ins./CFP/CLE	What You & Your Clients Should Know about Medicare: Bert Hene, Hene Health Brokerage
11:15-12:30pm	Lunch and Networking
Track A: Bridgeview 12:30-1:30pm 1 hr. GA Ins./CFP/CLE	Recent Developments in GA Case Law: Mary Radford, Georgia State University School of Law
Track A: Bridgeview 1:30-2:30pm 1 hr. GA Ins./CFP/CLE	The Tax Side of Retirement Planning: Greg Freeman, JD, ChFC®, CLU®, RICP, CLTC; Strategic Stewardship
OR	
Track B: Ballroom 12:30-1:30pm 1 hr. GA Ins./CFP/CLE	Life/LTC Combo Products & LTC Update: Tom Hebrank, CFP®, CLTC; Advanced Planning Solutions
Track B: Ballroom 1:30-2:30pm 1 hr. GA Ins./CFP/CLE	Using Executive Retirement Plans in Business Exit Strategies: Patrick Callahan, JD; Northwestern Mutual
2:30-2:45pm	Break with Sponsors
2:45-4:30pm 2 hrs. GA Ins./CFP/CLE	Social Security for Financial Professionals: Desmond Thornton, Social Security Administration (<i>2 hours GA Insur. ethics</i>)
4:30pm	Adjourn



Continuing Ed hours: Total 7 hrs., including 3 hrs. GA Ins. ethics

For more information about FSP or EPCNGA contact Margaret at (770) 516-0207, admin@fspatlanta.org or admin@epcnga.org.

