



The Road to Reinvention....



... A New Frontier

2018 Atlanta Benefits and Financial Services Forum

March 14, 2018
Cobb Galleria
7:30 a.m. – 4:30 p.m.

March 14, 2018
Cobb Galleria Center
Atlanta, Georgia



Welcome to the 2018 Atlanta Benefits and Financial Services Forum



*Trey Wise, President
Atlanta Association of
Health Underwriters*



*Kenneth Pendley,
President The Society of
Financial Service
Professionals Atlanta
Chapter*

It is my distinct pleasure to welcome you to the 2018 Forum. I know you are in for a fantastic day. To all of our members, thank you for being here, to all our guests, its our pleasure to have you with us. At any time if you have any questions, please feel free to share them with us. Have a great day.

Kenneth Pendley



Thank You Partners and Sponsors

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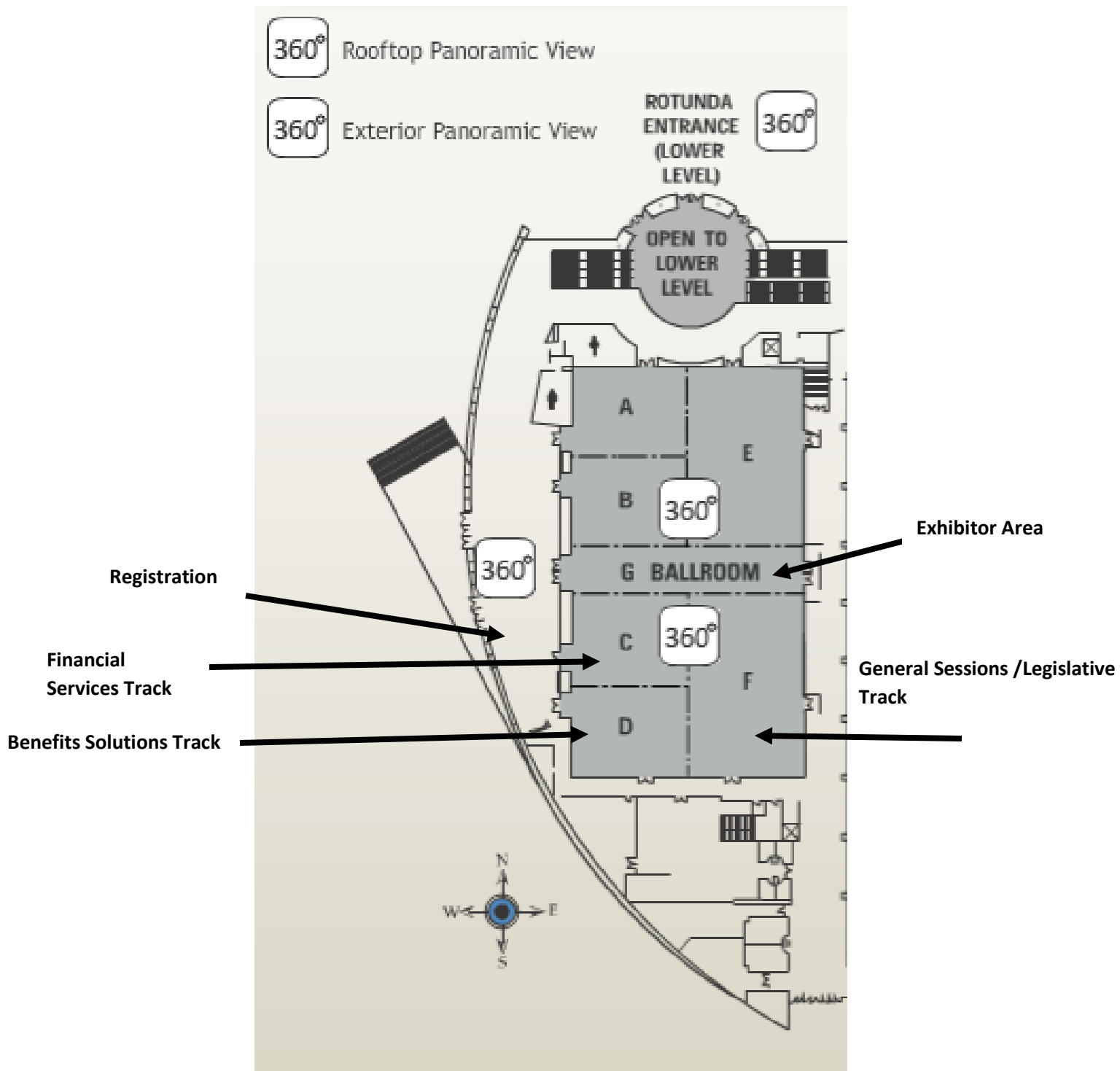


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Benefits Forum Silver Partners







Atlanta Benefits and Financial Services Forum Agenda

FORUM *Agenda*

7:30 am - 1:00 pm	Registration		
7:30 am - 8:30 am	Continental Breakfast - Visit with Sponsors and Vendors		
8:40 am - 8:50 am	Welcome, Sponsor Spotlight, and Agenda Summary		
8:50 am - 9:40 am	General Session -Legislative Update - Ballroom F Brad Carver, Hall Booth Smith; - (GA Ins.Ethics, CFP - applied for)		
9:40 am - 10:00 am	Break with Sponsors and Vendors		
	<u>Legislative</u> Ballroom F	<u>Benefits Solutions</u> Ballroom D	<u>Financial Services</u> Ballroom C
10:00 am - 10:50 am	Greetings from the Hill- ReCAP - Annette Bechtold, One Digital; Trey Wise, Admin America (GA Ins., Ethics - applied for)	The Value of Medicare vs. Long Term Care Expenses - Keith Nabb, Affordable Medicare Solutions (GA Ins. - applied for)	2017 Tax Act and Recent Developments in Tax and Estate Planning - Doug Duncan, Lefkoff Duncan Grimes and Miller- (GA Ins., CFP- applied for)
10:50 am - 11:10 am	Break with Sponsors and Vendors		
11:10 am - 12:00 pm	Measurement Madness: ACA Reporting Made Easy -Keith Hughes, Prime Pay (GA Ins. Ethics - applied for)	Financial Wellness / Cause Marketing - Lance Ledbetter, AMG Benefit Group (GA Ins. - applied for)	Incorporating Social Security into the Planning Process - Don Warnke, County Financial (GA Ins., CFP- applied for)
12:00 pm - 1:15 pm	Lunch General Session- Ballroom F <i>Top 10 Reasons Your Business Isn't Growing Fast Enough - Kristin Andree, Andree Consulting Group (GA Ins., CFP - applied for)</i>		
1:15 pm - 2:05 pm	Cures Act Update- Daniel "Trey" Tompkins, Admin America (GA Ins. Ethics- applied for)	Everything You Wanted to Know About PEOs and Were Afraid to Ask - Gene Fidell, Adams Keegan, Inc. (GA Ins. - applied for)	Crypto Currencies 101: What Advisors Need to Know-Duane Osborn, Regency Manning, Inc. (GA Ins., CFP- applied for)
2:05 pm - 2:25 pm	Break with Sponsors and Vendors		
2:25 pm - 3:15 pm	Mind Your Own Business, Jeff Morris, Insuperity (GA Ins. - applied for)	Self-Funding & Stop Loss 101 - Michael Wahlstrom, Tokio Marine HCC (GA Ins. - applied for)	Transparency in all Lines of Insurance and How It Will Help You! - Bryan Freeman, Habersham Funding (GA Ins., CFP- to be applied for)
3:20 pm - 4:10 pm	General Session -Empowering People of All Abilities - Ballroom F Aimee Copeland, Aimee Copeland Foundation (GA Ins., CFP- applied for.)		

Exhibitor Booths Open



What is the Society of Financial Service Professionals?

- Premier association in the industry—**thought leaders and industry experts** belong to FSP
- The **only** community of multidisciplinary professionals—you can build a strong team of advisors to help serve clients better
- World-class resources in your own back yard—**local and national networking and education opportunities**

Who are the members of FSP?

- Accomplished, credentialed financial advisors, attorneys, CPAs, insurance experts, and other professionals—immediate opportunities for collaboration and referrals

Why belong to FSP when other associations charge less but offer networking and educational opportunities, too?

- Networking with peers (of the same designation or discipline) doesn't offer the same opportunities for referrals as does a multidisciplinary community like FSP
- Broader range of educational offerings enhances your own expertise and fosters the exchange of ideas from different perspectives
- Special membership rates apply to those meeting the criteria for Young Professionals (age 40 and under)—those eligible pay only 50% of the cost of national membership in FSP

What benefits does FSP offer members?

- Access to relationships across multiple disciplines
- Dynamic educational opportunities with industry experts, both locally and nationally
- Authoritative publications, including the highly esteemed *Journal of Financial Service Professionals*
- Timely resources and knowledge to grow practices and fuel the highest level of client service
- Opportunities to gain leadership experience at local and national levels

What is the real value of membership in FSP for me?

- Build your network—create a multidisciplinary team of experts to better serve your clients
- Build your expertise—gain free access to high-quality, in-depth education across subject areas
- Build your practice—get referrals you wouldn't otherwise get in an organization focused on one credential

Belonging to FSP can build your network, enhance your expertise, and grow your practice.

We welcome qualified professionals who hold or are pursuing one of the following credentials:

AEP®, CASL®, CEBS®, CFA, CFP®, ChFC®, CIMA, CLF®, CLU®, CPA, CPCU®, CTFA®, Enrolled Actuary, JD, MBA, MSFS, MSM, Masters/PhD in Financial Services, REBC®, RHU®, RICP®.

To learn more about
belonging to FSP

www.SocietyofFSP.org

800-392-6900

(M-F, 9:00-4:30 ET)



Where Would You Be Without NAHU?

With NAHU representing the industry, policymakers have addressed many issues the healthcare reform bill promised to create:

- Allowing health insurance agents and brokers to sell private coverage both inside and outside of the new exchanges.
- Preserving private insurance plans as the predominant source of coverage, without the creation of a government-run public health insurance plan.
- Working with the National Association of Insurance Commissioners (NAIC) and policymakers to acknowledge the value of our members and the need to preserve your role in the health insurance system.

With NAHU working with key policymakers, your dues dollars continue to support our role as the voice of the industry:

- Creating a joint task force with the NAIC and the Department of Health and Human Services (HHS) to address agent compensation and medical loss ratio (MLR).
- Working closely with Congress and the Administration on the development of the new web portal for consumers to shop for health insurance.
- Working directly with the NAIC and providing guidance as states establish their exchanges.

With NAHU programs, you have access to member-only benefits:

Education: State and local chapters provide educational opportunities that keep you abreast of trends, new products and policy changes. These meetings also provide opportunities for you to form useful relationships to better your business.

Information Resources: With www.nahu.org, *HIU* magazine, timely newsletters and broadcast emails at your fingertips, you'll always have access to the most current industry information.

Discounts: From an exclusive agreement with Marsh Affinity Group for Agent Preferred E&O insurance to discounts on shipping, conference calling and other business communication needs, NAHU offers you opportunities to save money on the items and services you need to operate your business.



Mike Embry
NAHU National President



WITHOUT NAHU...

The health insurance agent and broker would be left alone to deal with ever-changing regulations and reform. NAHU is your partner during this turbulent time and will provide you with everything you need to continue growing your business and having a successful career.

As the standards for implementing national health reform are being developed, it is essential that they recognize and protect the indispensable role that licensed insurance professionals play in serving consumers.

— NAIC Resolution

For more information, visit
www.NAHU.org

Putting your membership dues to good use is our top priority. We are the only association working solely on behalf of health insurance agents, brokers and benefit professionals. We are your professional association and provide legislative advocacy, education, information resources, member recognition and member-only benefits.



Thank You Partners and Sponsors

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