

**THE GREATER CHICAGO CHAPTER of the
SOCIETY of FINANCIAL SERVICE PROFESSIONALS**

Presents...

**Change is Here!
Embrace it!**



**39TH ANNUAL SEMINAR
March 10, 2010**

7:00 am - 2:00 pm

Drury Lane Convention Center
100 Drury Lane • Oakbrook Terrace, IL
(630) 530-8300

6 CE/CFP/CPE Credits

Annual Sponsors





OUR SPEAKERS

"The Miracles of Income Protection"

John F. Nichols, CLU

Come hear John Nichols share his personal story on surviving and choosing to thrive after a near death accident left him totally paralyzed. You will learn the strategies that he utilized to empower relationships and drive results that have led him to TOT Production. You can overcome your adversity to live a life of empowered relationships, while leveraging your business to drive greater results. In this session, you will learn the 10 strategies, if implemented, which will increase your success leading to MDRT, COT and/or TOT membership. John Nichols is President of Disability Resource Group, Inc. He is a member of the Million Dollar Round Table with four Court of the Table and two Top of the Table qualifications.

"Estate Tax Laws – Going Forward"

Jack (Richard) Loney, J.D., CLU, CFP

Jack Loney is currently an Advanced Planning Consultant and Corporate Vice President with New York Life Insurance. Jack graduated with a Juris Doctorate degree from Drake University Law School. He holds a Bachelor of Science Degree in Education from Northwest Missouri State University where he majored in social sciences. Jack has experience in many areas including estate, business, charitable and retirement planning, insurance products, investments and an extensive background in training and education. He also has expertise in direct sales assistance in all aspects of the sales process including data gathering, analysis and review, case design and presenting options to prospects and clients.

"Changes to Healthcare & Government – How Does It Impact You"

Mark Lam, CFCI

Mark Lam is the Flex Products Relationship Manager at Flexible Benefit Service Corporation, a general agency and benefits administrator of tax-advantaged and consumer-driven benefit programs. Mark is responsible for managing and implementing various initiative for the Flex Products portfolio. Additionally, he is responsible for monitoring, communicating, and implementing the many regulations that govern these programs. Mark is an active member of the Employer Council on Flexible Compensation.

"Practice Management"

Jack Gruber

Jack Gruber is central regional director for Russell Investments' U.S. private client services business with primary responsibility for advancing the quality and level of service provided to its most senior partners in the private client service distribution sector. Jack's primary goal is to look outside the normal channels of client service and implement the next generation of value rich services provided to the professional investment community. Jack joined Russell Investments to help develop its fund distribution and consulting process through bank trust departments. Prior to joining Russell, Jack was with Paine Webber where he headed the advisor research department in Kansas City.

"10 Things You Should Know about Selling Life Insurance the Right Way"

Lanny Levin, CLU, ChFC

Lanny Levin graduated in Economics from Stanford and joined The Guardian Life Insurance Company as an agent. Lanny headed the Life Insurance Department for a major property and casualty insurance agency and has been the owner of the Lanny D. Levin Agency, Inc. since 1997. As past president of the Chicago Estate Planning Council, he has been a featured speaker for the CEPC, Practicing Law Institute, Illinois CPA Society, Chicago Bar Association, and many insur-

ance groups. He has presented workshops at many Chicago law and accounting firms. Lanny has recently been honored with the 2009 Solomon Huebner Scholarship by the Greater Chicago Chapter FSP and also was presented with the Austin Fleming Distinguished Service Award. Lanny speaks passionately about using life insurance and other financial products to create, preserve, and enjoy wealth, preserve businesses and reward executives.

7:00 - 7:30 am	Registration/Continental Breakfast/Exhibitors	11:00 - 11:45 am	Meet with Exhibitors/Lunch
7:30 - 7:45	Call to Order, Greeting, Pledge – John Passananti Invocation – Frank Marcin Opening Remarks – Steve Gerding	11:45 - 12:40 pm	Jack Gruber Russell Investments "Practice Management"
7:45 - 8:35	John Nichols, CLU Disability Resource Group, Inc. "The Miracles of Income Protection"	12:40 - 1:30 pm	Lanny Levin, CLU, ChFC Lanny D. Levin Agency, Inc. "10 Things You Should Know about Selling Life Insurance the Right Way"
8:35 - 9:25	Mark Lam, CFCI Flexible Benefit Service Corporation "Changes to Healthcare & Government – How Does It Impact You"	1:30	Closing Remarks and Thanks Exhibitor Raffle Winners Announced ~ Times subject to change ~
9:25 - 10:05	Break/Exhibitors		
10:05 - 11:00	Jack (Richard) Loney, J.D., CLU, CFP New York Life "Estate Tax Laws – Going Forward"		

Sponsorships Available —
for information contact us at **630.571.8030**



Registration Form

Please cut this off and mail your registration today!
Credit card payments can be faxed to 630-571-0253

<u>No. of Persons</u>	<u>TICKETS</u>	<u>Pre-Register</u>	<u>At Door</u>	<u>Amount</u>
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_____	Non-member	\$120	\$135	_____
_____	1 Table of 6 – Prepaid only (include names)	\$500	N/A	_____

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Mail to: **Greater Chicago Chapter**, 616 Enterprise Drive #110, Oak Brook, IL 60523
Phone: 630-571-8030 • Fax: 630-571-0253 • Email: ExecBusinessRes@sbcglobal.net

New members joining Greater Chicago Chapter FSP from January 1, 2010 through March 1, 2010 will receive FREE admission to this seminar

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