

“GUARDIAN UNIVERSITY”

Tuesday, August 5, 2008

LANNY D. LEVIN AGENCY, Inc. 



presents

“DEFINED BENEFIT PENSION PLANS: WHAT’S OLD IS NEW AGAIN”--And Better Than Ever!”

(3 hours CE credit)

Speakers:

Jerry Kalish, National Benefit Services, Inc.

Lanny D. Levin, CLU, ChFC, LANNY D. LEVIN AGENCY, Inc.

Some of the topics

- ◆ Legal and IRS update on 412(i) Plans [now 412(e)(3)]
- ◆ Larger deductions for traditional defined benefit plans under new funding rules
- ◆ The “green light” given to cash balance plans by the Pension Protection Act
- ◆ How profit sharing/401(k) plans can be combined with cash balance defined benefit plans to leverage significant benefits for owners and highly compensated employees
- ◆ How life insurance fits into all three types of defined benefit pension plans
- ◆ Case histories

Coffee & Rolls at 8:00 a.m.

Class begins promptly at 8:30 a.m. (ends at 11:30 a.m.)

Oakton College Business Conference Center, Golf Road, Des Plaines (just west of I-294)

Enroll at www.levinagency.com (click on Upcoming Meetings) OR

FAX registration (on reverse side) OR

Call Allen Flynn (847) 266-2243 or Email allen_flynn@levinagency.com

(Your Associates and Professional Advisors are also welcome)

JERRY KALISH is President of **National Benefit Services, Inc.**, a Chicago-based employee benefit firm he founded in 1978. Jerry has over 30 years of experience with closely-held companies, non-profits, publicly traded companies, and government agencies. His experience includes designing, administering and terminating all types of tax-qualified retirement plans; consulting with employers on their fiduciary duties; advising clients on benefit issues in corporate transactions; and designing and administering equity compensation programs such as stock option plans and ESOPs. Jerry is a member of the Employee Benefits Committee of the Taxation Section of the American Bar Association of which he is an Associate (Non-Attorney) Member.

LANNY D. LEVIN is the President of the **LANNY D. LEVIN AGENCY, Inc.** and is a Chartered Life Underwriter and Chartered Financial Consultant. The firm is a life insurance boutique, specializing in wealth preservation planning, executive benefits and business succession planning. Lanny is a past President of the Chicago Estate Planning Council and has been a featured speaker for the Chicago Estate Planning Council, DuPage County Estate Planning Council, Practising Law Institute, Illinois CPA Society, Chicago Bar Association, Greater North Shore Estate Planning Council, and Chicago & Northeastern Illinois Health Underwriters. He has presented workshops and seminars for many of Chicago’s top law firms and accounting firms. A majority of Lanny’s time is spent working jointly with other insurance, benefits and financial professionals. He is an active member in The Association for Advanced Life Underwriting, and a Life member of the Million Dollar Round Table.

LANNY D. LEVIN AGENCY, Inc. Creating Legacies, Preserving Businesses & Rewarding Executives
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www.levinagency.com



LANNY D. LEVIN AGENCY, Inc.
Class Enrollment Form

Tuesday, August 5, 2008

“DEFINED BENEFIT PENSION PLANS:
 WHAT’S OLD IS NEW AGAIN”--And Better Than Ever!”

YES, I will attend the class on Tuesday, August 5, 2008

**Associates & advisors are also welcome—
 Please fill out a separate registration for each one.**

Your Name	
Firm	
Address	
City, State, Zip	
Telephone	
FAX	
Email Address	

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I consent to receive newsletters, advertisements and other communications, including those sent by fax or email by (or on behalf of) **LANNY D. LEVIN AGENCY, Inc.** I understand that **THE LEVIN AGENCY** will not share my phone, fax number, or e-mail address with any third party without my prior written authorization. I can revoke this consent by contacting **THE LEVIN AGENCY** in writing.

X _____ (date)
 _____ (Your signature)

Sign & Fax back this registration form to (847) 681-9501

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