



BeeneGarter^{LLP}

Allianz

Nationwide Financial
Principal Financial
Highland Capital

Fidelity Investments
Jackson National
Legg Mason & Co LLC

First Trust
Hansen Brokerage
Transamerica

Thursday

WEST MICHIGAN FEBRUARY 9 PROFESSIONAL

Noto's Old World Italian
6600 28th Street SE
Grand Rapids, Michigan 49546
8:00am - 6:00pm
with Social Networking

CE SEMINAR

About the West Michigan Professional CE Seminar

The West Michigan Professional CE Seminar provides a unique educational opportunity for anyone in the financial industry to learn from experts in the field. Keynote speakers will focus on industry trends and economic factors affecting the ever-changing marketplace. Gather practical advice from the best in the business.

CONTINUING EDUCATION CREDITS

The West Michigan Professional CE Seminar offers 14 hours of continuing education credit. Program sessions have been designed to comply with most organizational requirements for continuing education credits.

CE SEMINAR SCHEDULE

Throughout the day, two educational options will be available to attendees. Attendees may choose which sessions are most applicable to them (see schedule matrix on next page).

TIME	ROOM ONE	ATTENDING
8:00 - 9:00	Nancy Sabolish, Beene Garter / Individual and Business Tax Update (MI CE, CPE, CFP, PACE)	<input type="checkbox"/>
9:00 - 9:10	BREAK	
9:10 - 10:10	David Ledbetter / Build Your IRA and Transfer it Too (MI CE, CPE, CFP, PACE)	<input type="checkbox"/>
10:10 - 10:20	BREAK	
10:20 - 11:20	David Ledbetter / Power of Trusts in Preserving, Enhancing and Transferring Wealth (MI CE, CPE, CFP, PACE)	<input type="checkbox"/>
11:20 - 11:30	BREAK	
11:30 - 12:30	Lauretta Murphy, Miller Johnson / Advanced Medicaid & Medicare (MI CE, CPE, CFP, PACE)	<input type="checkbox"/>
12:30 - 1:30	LUNCH	
1:30 - 2:30	Jack Leavy, Principal Non Qualified Plans (MI CE, CPE, CFP, PACE)	<input type="checkbox"/>
2:30 - 2:40	BREAK	
2:40 - 3:40	Laura Durkin, Nationwide / Understanding Retirement Plan Fees (MI CE, CPE, CFP, PACE)	<input type="checkbox"/>
3:40 - 4:20	Bruce Whitt, Nationwide / Policy Review, Retain, Repair or Replace (MI CE, CPE, CFP, PACE)	<input type="checkbox"/>
4:20 - 6:00	Social	

TIME	ROOM TWO	ATTENDING
8:00 - 9:00	Scott Russomanno, Allianz Life Re-Engineering Retirement (CE VOUCHER)	<input type="checkbox"/>
9:00 - 9:10	BREAK	
9:10 - 10:10	John Kutz, Legg Mason / The Fiduciary Formula: A Prudent Approach to 401(k) Investment Menus (MI CE, CPE, CFP, PACE)	<input type="checkbox"/>
10:10 - 10:20	BREAK	
10:20 - 11:20	Chris Trieber, Highland Life Insurance As An Asset Class (MI CE, CPE, CFP, PACE)	<input type="checkbox"/>
11:20 - 11:30	BREAK	
11:30 - 12:30	Scott Russomanno, Allianz Life High Impact Client Reviews (CE VOUCHER)	<input type="checkbox"/>
12:30 - 1:30	LUNCH	
1:30 - 2:30	FSP Ethics (continues after break) (MI CE)	<input type="checkbox"/>
2:30 - 2:40	BREAK	
2:40 - 4:20	FSP Ethics (continued) (MI CE)	
4:20 - 6:00	Social	

REGISTRATION OPTIONS AND FEES

Registration is free to NAIFA and FSP Members or \$50 to non-members and includes up to 7 hours of CE and lunch.

Registration deadline is February 3. Simply provide your class selections above and your payment information below, then phone, fax or email your registration to Deb Perrin:

PHONE: (616) 698-7787 FAX: (616) 698-2603 EMAIL: debp@altoprecision.com

CANCELLATION/DISPUTE/REFUND POLICY

Refunds for cancellation will be granted provided that Jane Owen is notified in writing by February 3. Cancellations received after February 3 will be ineligible for refund. For more information regarding refunds, please contact Jane Owen at jowen@beenegarter.com or (616) 262-2394.

1 Classroom Hour = 1 CE Credit

NAME: _____ PAYMENT*: CHECK ENCLOSED MADE PAYABLE TO WEST MICHIGAN FSP

COMPANY NAME: _____ VISA MASTERCARD AMEX

ADDRESS: _____ MAIL TO: SFSP, 6534 CLAY AVE. SW, GRAND RAPIDS, MI 49548

_____ CREDIT CARD #: _____

CITY/STATE/ZIP: _____ EXP DATE: _____ 3 DIGIT CODE: _____

PHONE: _____ NAME: _____

EMAIL: _____ SIGNATURE: _____

*WE DO NOT ACCEPT DISCOVER CARD