



Coaching Seminar (What to Present / How to Prepare It)

Las Vegas, NV (March 12-13, 2009)
Chicago, IL (June 25-26, 2009)
Atlanta, GA (Sept 24-25, 2009)

Coaching Leader: Robert B. Ritter, Jr., Chairman/CEO, InsMark, Inc.
(unless otherwise noted)

THURSDAY, DAY 1

7:30 a.m. – 9:00 a.m. Registration and Continental Breakfast

9:00 a.m. – Noon.

Break:

10:30 a.m. – 10:45 a.m.

Hot Concepts for Turbulent 2009

1. **Estate Tax Reform** (what it will likely be and how to deal with it)
2. **Good Logic vs. Bad Logic** (like a magnet for new clients)
3. **Wealthy Clients and Long-Term Care -- Yes or No?** (you can make it a big “Yes”)
4. **Single Premium Immediate Annuities** (new InsMark capacity)
5. **Retirement Needs Analysis** (your stockbroker friends won't believe it)
6. **The Cost of Waiting to Buy Life Insurance** (buy now for an impressive ROR)
7. **Term Insurance for \$1.00** (even if it were available, there is a better way)
8. **Life Plan** (everything a client needs to know about life insurance -- on one page)

Noon – 1:00 p.m.

Lunch

1:00 p.m. – 4:30 p.m.

Break:

2:30 p.m. – 2:45 p.m.

9. **Executive Bonus Plan** (three variations on a theme)
10. **Executive Trifecta®** (new executive benefit for principals and key executives of C and S Corporations, Limited Liability Companies, Partnerships, and Non-Profit Organizations)
11. **Death Benefit Only Plan** (when times are tough, this is a very powerful -- but inexpensive -- executive fringe benefit)
12. **Bank Premium Financing -- Impact on Net Worth & Wealth to Heirs** (not just a transaction -- a fully integrated estate analysis)
13. **Loan-Based Private Split Dollar** (an alternative to bank financing)
14. **InsMark's Power Producer Program** (the keys to the production kingdom)



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FRIDAY, DAY 2

7:30 a.m. – 8:30 a.m. **Continental Breakfast**

8:30 a.m. – 10:00 a.m. **Hands-On Training**

Presentation Coach: Julie Nayeri | Sales Manager | InsMark, Inc.

Hands-On System Training for Wealthy and Wise – Classic Gifting Analysis

Hands-On System Training for InsMark Illustration System – Effective Term Comparison, Executive Trifecta, and Executive Bonus Plan

10:15 a.m. – Noon

Break:

10:00 a.m. – 10:15 a.m.

15. Salary Continuation Plan (You can't be effective in the COLI market without without this approach)

16. Loan-Based Deferred Compensation (You can't be effective in the deferred compensation market without knowing this approach)

17. Split Dollar and Executive Benefits (You can't be effective in the split dollar market without knowing when to use which one of these concepts)

Endorsement Split Dollar

Endorsement Split Dollar with Salary Continuation

Loan-Based Split Dollar

Loan-Based Private Split Dollar (see Topic #13)

18. Roth IRA Conversions -- Yes or No (Be prepared for this big event starting January 1, 2010)

19. 2010 InsMark Symposium

Coaching Seminar Ends

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