

# 2018 InsMark Symposium EAST

September 14 - 15, 2018 | Philadelphia, PA

Strategic Alert #5

Listen to what fellow producers have to say  
about the InsMark Symposium.

The purpose of Strategic Alert #5 is to highlight a portion of the Main Platform on Day 1 of the [2018 InsMark Symposium East](#) scheduled for September 14 - 15, at the Courtyard Marriott (and adjacent to the Marriott Downtown) in Philadelphia.

## InsMark's Advanced Consulting Group (ACG)

We've Assembled A Group of Specialists That Can  
Solve Major Problems For Your Clients and  
Radically Increase Your Bottom Line



*Advisers working together can overcome  
even the biggest financial problems!*

Symposium East Presentation by: **Don Prehn**  
Marketing Consultant, Board Member, and Past President of InsMark

InsMark has spent the past three years assembling a team of the best niche specialists in the life insurance industry. The criteria for each specialist was (a) they had to be offering financial solutions that are very difficult for full service agencies to offer on their own, (b) they had to be recognized as one of the best providers in their specific area of expertise and (c) they had to be willing to work directly with you, your clients and their advisors to move the case from introduction all the way to close (including ongoing servicing).

These specialists can leverage your time and provide solutions to your clients that solve major problems and create incremental net profits for your firm. Areas include:

Optimizing the net after tax income from qualified plan dollars;

COLI/Executive Benefits for companies with sales of \$100 million or more;

COLI/Executive Benefits for smaller companies up to \$100 million in sales;

Life settlement sales where our specialists have agreed to offer a check and balance system that insures that you and your client receive the largest possible bidding group (and highest price) for each policy sold;

Premium financing for clients with estates over \$10 million (with new strategies available due to recent Tax Reform);

Premium financing to boost long term retirement income;

Bank-Owned Life Insurance for banks and credit unions.

We're excited to share more about InsMark's Advanced Consulting Group with you at The Symposium including detailed information about how to identify "right fit" clients for each niche area.

Contact Julie Nayeri at 1-888-InsMark (467-6275) or [julien@insmark.com](mailto:julien@insmark.com) for more Symposium information or click below for the Agenda and register online:



[Symposium East Agenda](#)

New details are added frequently.



[Register Now](#)

Online registration is open.  
Act now - seats are limited!



[Beginners Workshop](#)

September 13, 2018  
2pm - 6pm

I look forward to seeing you on September 14 - 15 in Philadelphia.

Bob

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**Prior Summaries of Topics to be Discussed at the 2018 Symposium:**

**Symposium Strategic Alert #1: (5/15/2018)**

Dual Security Plan - A New Executive Benefit (with unbelievably favorable tax consequences)

**Symposium Strategic Alert #2: (5/22/2018)**

Family Net Worth (a new way of presenting the effectiveness of wealth planning)

**Symposium Strategic Alert #3: (5/29/2018)**

Best Policy for My Clients (examining a client's risk profile in order to determine the best type of policy for that client)

**Symposium Strategic Alert #4: (6/5/18)**

The InsMark Symposium is coming to Philadelphia. Learn more about this meeting and why you should attend. Limited Seating!

**Important Note:** This information is for educational purposes only. In all cases, the approval of a client's legal and tax advisers must be secured regarding the implementation or modification of any planning technique as well as the applicability and consequences of new cases, rulings, or legislation upon existing or impending plans.