



## Media Advisory

**FOR IMMEDIATE RELEASE**

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**WHO:** Atlanta Association of Health Underwriters / Financial Services Professionals  
**WHAT:** 2016 Benefits Forum  
**WHEN:** March 22, 2016  
**WHERE:** Cobb Galleria Center, 2 Galleria Parkway SE, Atlanta, Ga 30339  
**WHY:** This healthcare and financial services summit will focus on training health insurance brokers and financial service professionals on how to improve their business practices and will have a focus on new compliance regulations established by the Affordable Care Act.

7:30 am – 1:00 pm	Registration		
7:30 am – 8:30 am	Continental Breakfast – Visit with Sponsors and Vendors		
8:40 am – 8:50 am	Welcome, Sponsor Spotlight, and Agenda Summary		
8:50 am – 9:40 am	General Session-Partnering for Success – Moderator: Gary Lane, CLU, Northwestern Mutual Panelists: Liz Frayer, Intrepid; Patrick O’Rourke, New World Benefits; Adam Pannell, Digital Insurance		
9:40am – 10:00 am	Break with Sponsors and Vendors		
10:00 am – 10:50 am	The Top 10 Compliance Items - Ashley Gillihan, Alston & Bird	Building a Successful Benefits Practice – Roger Schultz, CLU, Simple Benefit Plans	Diversifying Retirement Income Sources – C. W. Copeland, Ph.D., The American College
10:50 am – 11:10 am	Break with Sponsors and Vendors		



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11:10 am – 12:00 pm	Compliance Live- Annette Bechtold, Digital Insurance & Trey Tompkins, J.D., Admin America	Capitalizing on Disability Insurance – Josh Mills & Mike Gregory, UNUM	Investments Strategies and Future Outlook- Lee Friedman, CFP, USB Financial Services
12:00 pm – 1:15 pm	Lunch General Session- Long Term Care- Tucker Maxwell, CLTC, Long Term Care Solutions		
1:15 pm – 2:05 pm	Compliance Live- Annette Bechtold, Digital Insurance & Trey Tompkins, J.D., Admin America	Social Media Strategies to Build Your Personal Brand - Doroth�a Bozicolona-Volpe, Social Espionage	Long Term Care & Financial Abuse of Elders-Kristen Lewis, Smith, Gambrell & Russell
2:05 pm – 2:25 pm	Break with Sponsors and Vendors		
3:25 pm – 3:15 pm	Cafeteria Plans Updates	Expanding Your Market, Growing Your Revenue	Business Transition / Exit Planning-Bo Wilkins, CLU, ChFC, CAP Sound River Advisors; Zach Rike, CFA, ZTR enterprises; Jeremy Ellis, Genesis Capital
3:20 pm – 4:10 pm	General Session – Becoming a Healthier, Happier YOU!- Steve McSwain		
4:10 pm – 4:25 pm	Conference Conclusion – Acknowledgements		

**For more information or to RSVP, please contact John Czajkowski, AAHU  
Media/Communication Chairperson at (404) 723-1682 or [admin@aahu.org](mailto:admin@aahu.org).**

The National Association of Health Underwriters represents 100,000 professional health insurance agents and brokers who provide insurance for millions of Americans.

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