

 **Location:** Hotel Monteleone (New Orleans, LA)
 **Date:** Sunday, Nov 10 – Tuesday, Nov 12, 2024
 **Time:** 4:30 pm Sunday to 12:00pm Tuesday.

Independent BOLI/COLI (IBC) Study Group (hosted by Schiff Executive Benefits - SEB)




I. Sunday Venue:

- i) Reception – Hotel Monteleone (Room, TBD – 4:30pm – 6:30 pm)
- ii) 7:00/7:15pm - Dinner (Dine Arouds) – The Pelican Club, The Palace (a Brennan’s family rest), Mr B’s, GW Fins, Brennans, and Galatoires.

II. Monday Agenda: (Hotel Monteleone)

- i) Breakfast – 7:15am – 8:00am
- ii) Meeting Starts – 8:00am
 - (1) 8:00 am Opening – Matt Schiff
 - (2) 8:15 am – Credit Union/Corporate/Bank Market (Securian)
 - (3) 8:45 am – Jamie Hopkins – Bryn Mawr Trust (How to protect your corporate assets)
 - (4) 9:30 am – Protective Product and Concept Overview
 - (5) 10:00am - Break
 - (6) 10:15am – The EB Add on - Mike Fulco
 - (7) 10:45am – Pacific Life Product and Concept Overview (Carrier)
 - (8) 11:15am - Peter Ricchuiti – Tulane Economics Professor – Economic Update
 - (9) 12:15pm - Lunch
 - (10) 1:00pm – Guardian Product Update
 - (11) 1:30pm – Jason Early – The Business Valuation “Flugelbinder”
 - (12) 2:15pm – Midland Product Update
 - (13) 2:45pm - Break
 - (14) 3:00pm – New York Life – Corporate Markets and Retail Distribution
 - (15) 3:30pm – Life Settlements in the Business Market – Ashar Group (Meldelson)
 - (16) 4:15pm – UN-Meeting – The Nitty Gritty (no carriers).
 - (17) 6:30pm – 9:30pm – Reception and Dinner – TBD – In Quarter



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III. Tuesday Agenda

- (1) 7:15am – Breakfast
 - (2) 8:00am – Succession Planning for our firms – Dan Murphy (Ridgeback Group)
 - (3) 8:30am - John Hancock – PBIUL Product Updates
 - (4) 9:10am – PPLI and Critical Illness – How it should be part of your practice (Peter and Jay)
 - (5) 9:45am – Break
 - (6) 10:00am – Principal – Executive Term and NQDC Update
 - (7) 10:45am – Social Media Marketing – How to do it in 2024/5 (John Stamper)
 - (8) 11:15am – Employee Stock Ownership – Is it the “perfect” exit strategy for your business owners? – Dan Zugell
 - (9) 11:45am – Closing Comments/plans for next meeting
 - (10) 12:00pm - Departure
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