

# NEW YORK & NATIONAL LONG-TERM CARE BROKERS

## 3RD Quarter Training Schedule 2010

*(all times are Eastern Time unless otherwise noted)*

<u>Date &amp; Times</u>	<u>Exp. Level*</u>	<u>Topic</u>	<u>Instructor</u>
Thursday July 1, 2010		<b>No Class This Week – Enjoy Your 4<sup>th</sup> of July Holiday!</b>	
Thursday July 8, 2010 2:00 – 3:00 PM	B/I	<b>Indexed Annuities – “Debunking the Myths”</b> <ul style="list-style-type: none"> <li>Why NOW is the right time for clients</li> <li>Accumulation through income</li> </ul>	Frank Johnson Regional Vice President, Northeast American General Life
Thursday July 15, 2010 2:00-3:00 PM	B/I	<b>Exploding Your Multilife LTCi Sales – a day with Phyllis Shelton! – offsite location/no webinar – call Jeannie at 518.688.8136 for info or to reserve a spot</b> <ul style="list-style-type: none"> <li>Prospecting &amp; making the employer sale</li> <li>Making the employee &amp; family sale and more...!</li> </ul>	Phyllis Shelton President & Founder LTC Consultants
Thursday July 22, 2010 2:00-3:00 PM		<b>No Class This Week Due to our Annual Charity Golf Outing on July 22 to Benefit the Double H Ranch</b> <ul style="list-style-type: none"> <li>Contact Brian O’Connell at 518.688.8132 ASAP for sponsorship and/or player sign up info!</li> </ul>	N/A
Thursday July 29, 2010 2:00-3:00 PM	B/I	<b>Creative Ways to Save on LTCi Premiums</b> <ul style="list-style-type: none"> <li>Confused about all the discounts?</li> <li>Some innovative ways to keep LTCi premiums reasonable!</li> </ul>	Matthew Gaul LTC Support Specialist NY/NLTCB
Thursday August 5, 2010 2:00PM-3:00PM	I	<b>Top 10 Reasons why “Life for the Living” Should Be The Foundation For Individual Life Insurance Plans</b> <ul style="list-style-type: none"> <li>A competitive UL product with CASH LTC benefits</li> <li>No cost rider for LTC and more!</li> </ul>	Steve Shorrock Principal Life Ventures Corp/Veris Settlement Partners
Thursday August 12, 2010 2:00-3:00 PM	B	<b>Partnering with CPAs and Attorneys</b> <ul style="list-style-type: none"> <li>How to make the most of the relationship</li> <li>How to make it work for you and them</li> </ul>	Brian O’Connell, CLTC Marketing & Training Specialist, NY/NLTCB
Thursday August 19, 2010 2:00-3:00 PM	B	<b>Colony TermUL – a Key Alternative in the Term Market</b> * A product for multiple client needs for today	Chad Bachorowski, CFP Regional Vice President Genworth Financial
Wednesday - Thursday August 25-26, 2010	B/I	<b>LTCi Sales Academy (onsite only – no webinar due to program length)</b> <ul style="list-style-type: none"> <li>Product, Underwriting, Prospecting &amp; Marketing</li> <li>Sales Process, Medicare, Medicaid</li> </ul>	
Thursday September 2, 2010 2:00-3:00 PM	B	<b>The Vital Role of Assisted Living in the Long Term Care Picture</b> <ul style="list-style-type: none"> <li>How does LTCi pay for Assisted Living Care?</li> <li>Are all assisted living settings created equal?</li> </ul>	Jane-Marie Schaeffer Attorney at Law Pierro Law Group <b>New Instructor!</b>
Thursday September 9, 2010 2:00-3:00 PM	B	<b>LTCi Underwriting Tips for the Field Underwriter</b> <ul style="list-style-type: none"> <li>How to make your [underwriting] life easier</li> <li>Elevate your acceptance rate for LTCi</li> </ul>	Peter Kelly, CLTC COO & Chief Underwriter NY/NLTCB
Thursday September 16, 2010 2:00-3:00 PM	I	<b>Growing a Retirement Plan Practice Using Cash Balance Plans</b> <ul style="list-style-type: none"> <li>Gaining access to the high net worth business owner</li> <li>Cash balance plans – how they work, how they can help YOU</li> </ul>	Courtney Zanghi Pension Director Rick May UNIFI Companies
Thursday September 23, 2010 2:00 – 3:00 PM	B	<b>Life Insurance – It’s NOT Just About the Death Benefit!!</b> <ul style="list-style-type: none"> <li><b>NEW CLASS</b> - Designing cases with living benefits (including cash ACCUMULATION) in mind – and Advanced Sales Ideas!</li> </ul>	Ed Hale, JD, CLU Advanced Markets Consultant Aviva Life
Thursday September 30, 2010 2:00 – 3:00 PM	B	<b>Discounts &amp; Underwriting &amp; Product – Oh My! – DI Opportunities in 2010!</b> <ul style="list-style-type: none"> <li>Do you know about all your opportunities?!</li> </ul>	Jim Gedney, LUTCF Life & DI Coordinator NY/NLTCB

*Each Session (unless otherwise noted) is Slated to be Available Via Webinar as well as “Live”*

\* “Experience Level” legend – B = Beginner; I = Intermediate; A = Advanced

Call Brian O’Connell at 518.371.5522 or 800.695.8224 (ext 132) or email Brian @ [boconnell@nylctc.com](mailto:boconnell@nylctc.com) to register for a class.