National Life Group®

CPA ADVANTAGE®

CPA Symposium

MAY 3-5, 2023 | ARIA RESORT AND CASINO

Tuesday, May 2

Arrivals throughout the day. No planned events.

Wednesday, May 3		Speaker/s	Location: Joshua 1/2
7:30	Breakfast	*Location: Joshua 5/6*	
8:00	Opening/Welcome	Matt Ryan, JD*, AVP, Advanced Markets, National Life Group **Host:** John Saad, CLU, ChFC, CLF, Vice President, Independent Distribution, National Life Group	
8:15	Strategies & Best Practices	Allan Koltin, CPA, CEO, Koltin Consulting Group, Inc.	
10:45	Break		
11:00	Give Me Deductions: Benefiting From a Plan	Mary Read, CPC, QPA, CPFA, National Director of Pension and Protection Planning, Pentegra Retirement Services	
12:00	Lunch	*Location: Joshua 5/6*	
1:00	Nonqualified Executive Benefits	Matt Ryan, JD*, AVP, Advanced Markets, National Life Group	
1:50	Break		
2:00	Benefits of Life Insurance	John Saad, CLU, ChFC, CLF, Vice President, Independent Distribution, National Life Group	
3:00	Impact of Social Security & Medicare in Retirement	Scott Levin, CFP, AIF, Worthington Financial Partners	
4:00	Advice Requested, Advice Given, & Best Idea Heard Today	Allan Koltin, CPA, CEO, Koltin Consulting Group, Inc., and CPA Panelists	
5:00	Reception	*Location: Lift Bar*	

Note: Dinner is on your own and at your leisure.

Thursday, May 4		Speaker/s	Location: Joshua 1/2
8:00	Breakfast	*Location: Joshua 1/2*	
8:30	Recap of the Previous Day	Matt Ryan, JD*, AVP, Advanced Markets, National Life Group **Host:** Angela Ashley, Unique Business Planning, LLC	
8:45	Overlooked and Underused Tax Deductions	Mary Read, CPC, QPA, CPFA, National Director of Pension and Protection Planning, Pentegra Retirement Services	
9:45	Break		

Thursday, May 4		Speaker/s	Location: Joshua 1
10:00	Buy-Sell Planning	Pamela Cathlina, JD*, CLU, Advanced Markets, National Life Group	
11:00	Get the IRS Out of Your Retirement	Mary Read, CPC, QPA, CPFA, National Director of Pension and Protection Planning, Pentegra Retirement Services	
12:00	Lunch	*Location: Starvine 10/11*	
1:00	Case Study: Executive Benefits	David Hayward, CLU, ChFC, FLMI, Advanced Sales Specialist, Advanced Markets, National Life Group	
1:50	Break		
2:00	From Traps to Taxes: Tax Traps with Life Insurance and Annuities	Pamela Cathlina, JD*, CLU, Advanced Markets, National Life Group	
2:50	Break		
3:00	**Panel Discussion:** Incorporating Financial Services into Your Practice	Sean Adams, CPA, New Beginnings Financial Consulting Angela Ashley, Unique Business Planning, LLC Lee Duncan, President & CEO, Alliance Group Richard Easton, CPA, Richard H. Easton, CPA, P.C. Jeff Forrestall, CPA, CFF, Managing Partner, Forrestall CPAs Jong Lee, CPA, EA, CFF, The Lee Accountancy Group Scott Levin, CFP, AIF, Worthington Financial Partners John Saad, CLU, ChFC, CLF, Vice President, Independent Distribution, National Life Group **Moderator**: Matt Ryan, JD*, AVP, Advanced Markets, National Life Group	
4:30	Adjourn		

Note: Dinner is on your own and at your leisure.

Friday, May 5		Speaker/s	Location: Joshua 1/2
8:00	Breakfast	*Location: Joshua 5/6*	
8:30	Case Study: Qualified Plans	David Hayward, CLU, ChFC, FLMI, Advanced Sales Specialist, Advanced Markets, National Life Group	
9:30	SECURE Act 2.0/ Legislative Updates	Matt Ryan, JD*, AVP, Advanced Markets, National Life Group Pamela Cathlina, JD*, CLU, Advanced Markets, National Life Group	
10:30	Joint Marketing Strategies/ Tools/Recap	Matt Ryan, JD*, AVP, Advanced Markets, National Life Group	
11:30	Departures		

Qualified plans are offered and administered independently of the companies of National Life Group. National Life is bound only by the terms of the life insurance contracts issued by the Group insurance companies.

National Life Group® is a trade name of National Life Insurance Company, Montpelier, VT, Life Insurance Company of the Southwest, Addison, TX and their affiliates. Each company of National Life Group is solely responsible for its own financial condition and contractual obligations. Life Insurance Company of the Southwest is not an authorized insurer in New York and does not conduct insurance business in New York.

*Not practicing law on behalf of National Life Group.

For Financial Professional Use Only - Not For Use With The Public