

CPA Symposium

NOVEMBER 8–10, 2023 | VDARA HOTEL AND SPA | LAS VEGAS, NV

Tuesday, November 7

Arrivals throughout the day.

5:30 p.m. Welcome Reception (optional) *Location: Vice Versa*

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

Wednesday, November 8

Speaker/s

Location: Vinoly Ballroom

7:30 a.m.	Breakfast	<i>Location: Vinoly Ballroom</i>
8:00 a.m.	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 a.m.	Strategies & Best Practices	Allan Koltin, CPA, CEO, Koltin Consulting Group, Inc.
10:45 a.m.	Break	
11:00 a.m.	Give Me Deductions: Benefiting From a Plan	Mary Read, CPC, QPA, CPFA, National Director of Pension and Protection Planning, Pentegra Retirement Services
12:00 p.m.	Lunch	<i>Location: Silk Road</i>
1:00 p.m.	Nonqualified Executive Benefits	Matt Ryan, JD*, AVP, Advanced Markets, National Life Group
1:50 p.m.	Break	
2:00 p.m.	Benefits of Life Insurance	John Saad, CLU, ChFC, CLF, Vice President, Independent Distribution, National Life Group
3:00 p.m.	Leverage Life Insurance to Secure Tax-Free Income Utilizing Pre-Tax Compensation	Jeff Faine, CLU, Founder, Managing Partner, Enhanced Funding Solutions
4:00 p.m.	Advice Requested, Advice Given, & Best Idea Heard Today	Allan Koltin, CPA, CEO, Koltin Consulting Group, Inc., and CPA Panelists
5:00 p.m.	Reception	<i>Location: Silk Road</i>

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

Thursday, November 9

Speaker/s

Location: Vinoly Ballroom

8:00 a.m.	Breakfast	<i>Location: Vinoly Ballroom</i>
8:30 a.m.	Recap of the Previous Day	Matt Ryan, JD*, AVP, Advanced Markets, National Life Group Host: Angela Ashley, Unique Business Planning, LLC
8:45 a.m.	Overlooked and Underused Tax Deductions	Mary Read, CPC, QPA, CPFA, National Director of Pension and Protection Planning, Pentegra Retirement Services

Thursday, November 9		Speaker/s	Location: Vinoly Ballroom
9:45 a.m.	Break		
10:00 a.m.	Impact of Social Security & Medicare in Retirement	Scott Levin, CFP, AIF, Worthington Financial Partners	
11:00 a.m.	Get the IRS Out of Your Retirement	Mary Read, CPC, QPA, CPFA, National Director of Pension and Protection Planning, Pentegra Retirement Services	
12:00 p.m.	Lunch	<i>Location: Silk Road</i>	
1:00 p.m.	Case Study: Executive Benefits	David Hayward, CLU, ChFC, FLMI, Advanced Sales Specialist, Advanced Markets, National Life Group	
1:50 p.m.	Break		
2:00 p.m.	Buy Sell Planning	Matt Ryan, JD*, AVP, Advanced Markets, National Life Group	
2:50 p.m.	Break		
3:00 p.m.	Panel Discussion: Incorporating Financial Services into Your Practice	Sean Adams, CPA, CPT, New Beginnings Financial Consulting Angela Ashley, Unique Business Planning, LLC Richard Easton, CPA, Richard H. Easton, CPA, P.C. Scott Levin, CFP, AIF, Worthington Financial Partners Sara Melton, Five Rings Financial John Saad, CLU, ChFC, CLF, Vice President, Independent Distribution, National Life Group Moderator: Matt Ryan, JD*, AVP, Advanced Markets, National Life Group	
4:30 p.m.	Adjourn		

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

Friday, November 10		Speaker/s	Location: Vinoly Ballroom
8:00 a.m.	Breakfast	<i>Location: Vinoly Ballroom</i>	
8:30 a.m.	Case Study: Qualified Plans	David Hayward, CLU, ChFC, FLMI, Advanced Sales Specialist, Advanced Markets, National Life Group	
9:30 a.m.	Opportunities with Annuities	Jim Moseley, Advanced Sales Specialist, National Life Group	
10:30 a.m.	Joint Marketing Strategies/Tools/Recap	Matt Ryan, JD*, AVP, Advanced Markets, National Life Group	
11:30 a.m.	Departures		

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