Laureate Center
FOR WEALTH ADVISORS

The Gathering 2016
San Diego, California

Dare To Be An Expert
Attract, Engage, and Work with Clients with Specific Needs

When you limit your marketing to one type of client, is that all you're known for - or - does it attract a variety of types of clients and advisors to you, knowing that you are an expert? In two days, survey your options...and choose!

Please join us for our twelfth annual Gathering for two days of shared insights, education, and collegiality. The Gathering is an annual event for all advisors in Estate, Business, and Wealth Strategies Planning. As we gather and work together we can, through collegiality and collaborarion, provide the leadership our clients are seeking to offer clarity and direction for their planning needs.

The format of the two-day Gathering is designed to engage all participants in a conversation where audience interaction is as critical as what is communicated from the front of the room. The presenters are each experts in their field who enjoy sharing and who give of themselves and their time. Their unique skills, wisdom, experience, expertise, and judgment are truly invaluable when *helping clients fulfill their enlightened dreams.*

Program Location and Accommodations:
San Diego Marriott Del Mar | 11966 El Camino Real | San Diego, California 92130
Phone: (858) 523-1700

"The Gathering" Room Rate:
$162 (Reserve your room by February 10, 2016)
(look for reservation link at www.2016gathering.com)

Dates and Times:

Thursday, February 25, 2016	7:00am – 8:00am	Registration, Breakfast, Meet the Presenters and Sponsors
	8:00am – 4:30pm	General Session
	5:30pm – 11:00pm	Circle of Friends Mardi Gras Charity Event – *"It's Your Legacy"*
Friday, February 26, 2016	7:30am – 8:00am	Check-in and Breakfast
	8:00am – 5:00pm	General Session
	5:00pm – 6:30pm	Networking Reception with Presenters

Participation Fee:
The Gathering - $420
Circle of Friends Only - $200 (waived with the Gathering fee)

Continuing Education Credits:
CFP & CA Insurance – credits applied for
CPA & MCLE (approved provider #11857) - credits offered

To Attend:
Register on-line at www.2016Gathering.com or call 858-200-1911

Southern California Institute
America's TOP PLANNER
NETWORK. SHARE. COLLABORATE.
Society of FSP
Financial Service Professionals
Alzheimer's | SAN DIEGO

The Gathering 2016 Agenda - Day One

Thursday, February 25: General Session, Day 1

7:00am – 8:00am **Registration, Breakfast, Meet the Presenters and Sponsors**

8:00am – 8:10am **Opening**

8:10am – 9:30am **Current Developments Affecting Our Planning;** *presented by David K. Cahoone, Esq.*
Our 12th annual current developments session focuses on 2016 planning opportunities for financial advisors, CPAs, insurance professionals, trust officers, and attorneys seeking clarity and purpose to survive and thrive in this new world of high anxiety, uncertainty, and ever increasing focus on income tax savings, wealth creation, and wealth preservation. In a lively, highly interactive format we'll share practical and relevant ideas you can bring to your clients in 2016 and beyond that will bring real value to our clients as we learn together what's new, what to do, and what not to do.

9:30am – 10:00am **Break**

10:00am – 10:50am **The Big 10 Questions Every Client is Thinking - Even If They Don't Ask!;** *presented by Max Bolka and Shelley Lightfoot, Executive Director*
You've done your "targeted" marketing correctly and have the right person sitting in front of you, fully qualified...Now what? During the initial consultation you can easily, effortlessly and automatically build trust, establish credibility, exude confidence, and maintain control of the interview without being controlling. In this talk, Max and Shelley show us exactly how to anticipate these questions and clearly and succinctly articulate our answers, prompting potential clients not to say at the end of the intial interview, "This sounds good...Let me think about it." but rather, "This sounds good...How do we get started?"

10:50 – 11:40am **How to Turn Opportunity Into Revenue;** *presented by Randy Fox and Lee Hoffman*
Spotting charitable giving opportunities in your client's life is the first step to success in charitable estate planning. In this session we will be going over several places you can look for opportunities, the charitable tools to use and the potential revenue generated for the charitable estate planner.

11:40am – 12:30pm **Planning for the 4th Quarter of Your Client's Life;** *presented by Valerie Peterson, JD and Scott Stewart, Esq.*
Expert in Elder Law? Estate planning is not what it used to be. As an industry we planned very well for our clients in the moments before they die and after their death - but we woefully under planned for their disability, especially a long-term disability. Valerie and Scott will go over not only the opportunities to help our past clients correct their plans, but also how to use this "4th Quarter" planning of life concept to attract and deeply help those individuals and couples over 60 years old - and even those younger families. This may be your next evolution as a practitioner.

12:30pm – 1:50pm **Sponsored Lunch**

1:50pm – 2:40pm **Dealing with Real Estate in a Contested Matter - Before and After Death;** *presented by Freddy Garmo, Esq. and Alex Matuk, Esq.*
Join a long-time litigator and an experienced real estate attorney/broker/litigator to discuss the common (and more complex) issues property owners face during their lifetime, as well as the problems that occur after death, and how they can be avoided. Trust/probate litigation is now commonplace, and it almost always involves real property disputes. Explore how the way real estate is held and managed affects a person's estate plan, and learn about the interplay between a trustee's duties and the interests of the beneficiaries.

2:40pm – 3:10pm **Break**

3:10pm – 4:00pm **Jurisdiction Showdown - If We Don't Introduce Our Clients to Jurisdictional Planning Opportunities... Someone Else Will**
Join our panel of experts from multiple states and international jurisdictions representing trust officers, financial advisors, and attorneys as they "shoot it out" to help you compare and contrast various jurisdictions' statuatory, taxation and investment platforms for your clients. Understand the challenges and opportunities when engaging your clients in planning outside of their current state of residence. Do you include jurisdictional selection planning in your practice by partnering with experts, holding yourself out as the expert, or, do you ignore it all together?

4:00pm – 4:30pm **TAKING IT HOME;** *presented by Steve Mancini, Esq., David K. Cahoone, Esq., and Joe Strazzeri, Esq.*
As with any program that we as practitioners attend, the time that it takes to understand is irrelevant if we don't do something with it once we get back to our offices. Steve, David and Joe will share practical applications of today's program and how to integrate it into your business to help your clients, team, and cash flow.

5:30pm – 11:00pm **Circle of Friends Mardi Gras Charity Event – *"It's Your Legacy"***
As part of your Gathering registration and fee, join us for this night where The Southern California Institute will host our "Circle of Friends" Mardi Gras Gala. This annual event is an appreciation night for Laureates and Members of the Institute, as well as their families, clients, and friends. This year's ***"It's Your Legacy"*** event will be an elegant evening offering cocktails, dinner, music, live auctions, "59 Second Legacy Project" videos, dancing, and casino style gaming. Dress is "black-tie optional" and costumes are encouraged. All proceeds will benefit Alzheimer's San Diego.

Join Us For Our Annual

Circle of Friends Mardi Gras Charity Event

"It's Your Legacy"

Thursday Evening, February 25, 2016

5:30 pm - 11:00 pm

San Diego Marriott Del Mar

Register (as part of your Gathering registration and fee) on-line at www.2016 gathering.com

(See above for full description of the evening)

The Gathering 2016 Agenda - Day Two

Friday, February 26: General Session, Day 2

7:30am – 8:00am **Check-in and Breakfast**

8:00am – 8:10am **Opening**

8:10am – 9:00am **The Legacy Conversation: A Powerful Way to Deepen Your Connection to Clients and Prospects;** *presented by Rick Abbondanza, Esq. and Stan Miller, Esq.*
How do we as advisors have those important conversations with clients about how to pass their values on to their next generation in a business succession scenario. Values that are based in work ethic, family, philanthropy, and faith have had much to do with the success of the family business. A successful transfer can be all the more satisfying when those legacies are an intentional part of the succession plan. When you can initiate and lead that conversation, you will become a more valuable resource to your business owner clients. In this presentation, we will outline some stategies that will give you the confidence to lead your clients into this space and generate productive outcomes.

9:00am – 9:50am **Tax Free Investing and Retirement;** *presented by Scott Gunderson, JD and Greg Crawford, CFP*
Forget about NINGs - if you have clients who want to (1) eliminate state and federal income taxes on their investements, (2) invest in highly tax inefficient assets (think hedge funds, ordinary income producing assets), (3) protect their investments from creditors, and (4) have a source of income-tax free retirement income - we've got the solution for you - and it works in all 50 states.

9:50pm – 10:20am **Break**

10:20am – 11:10am **Alzheimer's - Helping Our Clients Plan for and Protect Themselves and Their Assets;** *presented by Mary Ball, President/CEO, Alzheimer's San Diego and Dr. Michael Lobatz, Director, Rehabilitation Center at Scripps Memorial Hospital Encinitas and Senior Partner, The Neurology Center*
The largest financial threat to 99% of Americans is the cost of long-term care. The largest healthcare threat to clients above 60 years old is Alzheimer's - which very well may cause the need for long-term care. How do we notice, what do we do, where is the help, and how do we get it?

11:10am – 12:00pm **Making Asset Protection Less Complicated and Better for the Client;** *presented by Jeff Burr, Esq. and Joe Strazzeri, Esq.*
So, is asset protection a primary concern for today's client - or is it just hype - or is it misunderstood? Join Jeff and Joe as they demystify understanding how to identify the appropriate clients, assets, and jurisdictions that keep the current advisors involved and more simply protect a client's family and their assets. Review the four categories of choices in today's onshore and offshore world.

12:00pm – 1:10pm **Sponsored Lunch - Alliance Trust Company with Greg Crawford, CFP**

1:10pm – 2:00pm **Insurance Bootcamp Fast Start Workshop;** *presented by Trey Fairman, JD, LLM and Steve Mancini, Esq.*
From dead stop to cruising speed - how to learn everything you need to insure your book in under 1 hour! During this fast-paced information-packed session Trey and Steve will help you gain an understanding of key and advanced insurance concepts and how to spot the opportunities as well as the confidence to effectively communicate these concepts with your clients.

2:00pm – 2:50pm **Counseling a Philanthropic Silicon Valley Entrepreneur in Setting up a Charitable Initiative: What are the Options?;** *presented by Peter Myers, Esq. and Sean Kenney, Esq.*
Peter and Sean will discuss creative and unique structures for setting up philanthropic initiatives - how some will synthesize charitable trusts but avoid the pitfalls and problems of UBTI, self-dealing, and private inurement restrictions.

2:50pm – 3:10pm **Break**

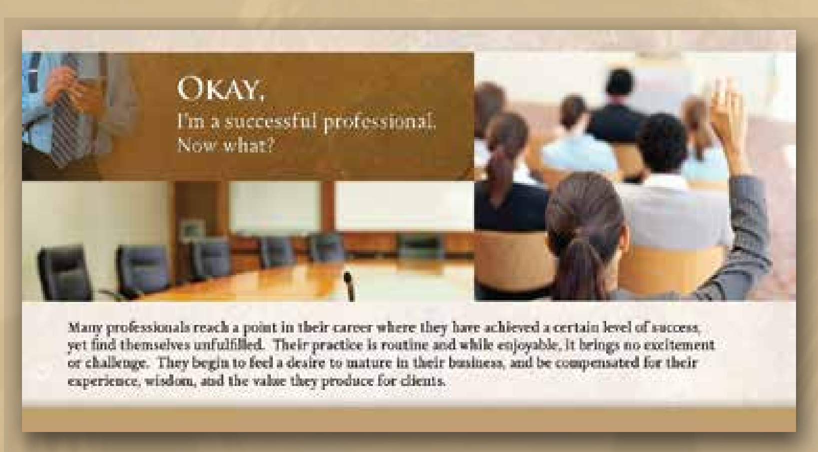
3:10pm – 4:00pm **Multigenerational Wealth Leverage Using Third Party Financing for Life Insurance;** *presented by Justin Smith and Amanda Eldridge, CLU, ChFC*
A case study of the use of third party financing to efficiently protect wealth into the second generation and beyond. Justin and Amanda will discuss structures that build-in safeguards to reduce some of the critical risks inherent in financing premiums.

4:00pm – 4:50pm **The Evolution of Planning with Entrepreneurs - What's Next?;** *presented by Eve Nasby and Matt Brogdon, PRC*
Financial, legal, and tax products and structures are NOT what entrepreneur clients are seeking. Join Eve and Matt as they reveal how C-suite options and staffing may have you be seen as the advisor that truly helps the business grow and the owner take a step back. Create value for your clients, planning/product opportunities, and the asset your clients have always wanted - market for and help clients in a whole new way.

4:50pm – 5:00pm **Taking it Home;** *presented by Steve Mancini, Esq., David K. Cahoone, Esq. and Joe Strazzeri, Esq.*
Review specific action steps and apply these two days to your business in a way that increases cash flow and helps your team and clients.

5:00pm – 6:30pm **Networking Reception with Presenters in Arterra**
$4,500 Laureate tuition drawings - must be present to win

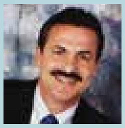
Exhibitor Opportunities Available – please call Shelley at 858-200-1911



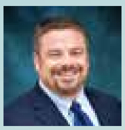
The Gathering 2016 Presenters

Rick Abbondanza, Esq., Hopkinson & Abbondanza; www.hablaw.com

Mary Ball, President and CEO, Alzheimer's San Diego; www.alzsd.org

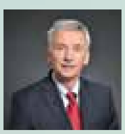


Max Bolka, Comprehensive Business Consulting; www.maxbolka.com



Matt Brogdon, PRC, Military Division at Microsoft

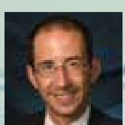
Jeff Burr, Esq., Jeffrey Burr Estate Planning and Probate Attorneys; www.jeffreyburr.com



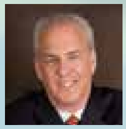
David K. Cahoone, Esq., Principal, David K. Cahoone, PA; Of Counsel, Johnson, Browing, and Clayton; Co-Owner, Laureate Center for Wealth Advisors; www.laureatecenter.com

Greg Crawford, CFP®, Co-Manager, Alliance Trust Company; www.alliancetrustcompany.com

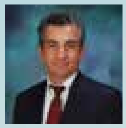
Amanda Eldridge, CLU®, ChFC®, First Insurance Funding Corp.; www.firstinsurancefunding.com



Trey Fairman, JD, LLM, Senior Wealth and Insurance Planning Strategist, Millenium Brokerage Group; www.mbginstitutional.com



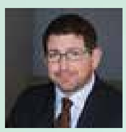
Randy Fox, Principal, Two Hawks Consulting LLC, Editor in Chief of Planned Giving Design Center; www.pgdc.com



Freddy Garmo, Esq., Garmo & Garmo; www.garmolaw.com

Scott Gunderson, Esq., Scott Gunderson, Attorney at Law; www.scottgunderson.com

Lee Hoffman, President and CEO, Planned Giving Design Center; www.pgdc.com



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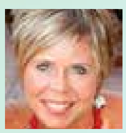

Shelley Lightfoot, Executive Director, Southern California Institute; www.scinstitute.org

Dr. Matthew Lobatz, MD, The Nerology Center; www.neurocenter.com

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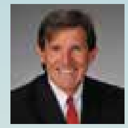

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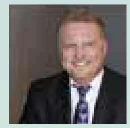

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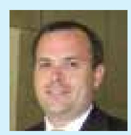
Eve Nasby, Vice President, Amerit Consulting; www.ameritconsulting.com

Valerie Peterson, JD, CEO, ElderCounsel; www.eldercounsel.com

Justin Smith, Principal and Managing General Agent, Cavalier Associates; www.cavalierassociates.com; Co-Founder, America's Top Planner; www.americastopplannerevent.com



Scott Stewart, Esq., Managing Partner, California Estate and Elder Law, LLP; www.estate-elderlaw.com

Joe Strazzeri, Partner, Strazzeri Mancini, LLP, www.strazzerimancini.com; Partner, California Estate and Elder Law, www.estate-elderlaw.com; Co-Owner, Laureate Center for Wealth Advisors, www.laureatecenter.com

"Achieve quiet confidence to work with wealth families while practicing profitability, efficiently, and with passion."

- David K. Cahoone

Contact us today to find out if the Laureate Program is right for you.

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