October 11th–14th, 2014

Gaylord Opryland Resort & Convention Center • Nashville, TN

10th Annual International DI Society Conference

Join us in Music City, USA for two and a half power packed days full of sales ideas, outstanding speakers and topics, breakout sessions, networking opportunities and our 10th anniversary celebration.

Nashville is so much more than just country music. It's a city of culture and history, haute cuisine, pro sports, natural beauty and pure Southern charm.

INTERNATIONAL DI SOCIETY
Producers Insurers Regulators Educators

Our 10th Anniversary!

INTERNATIONAL DI SOCIETY
Producers Insurers Regulators Educators

Visit our website for a complete schedule of events, and hotel information.

General Sessions

SUNDAY, OCTOBER 12, 2014

Our 10th Anniversary!

"What's Working Online: Unbeatable Strategies for DI Marketing & Sales"

PAUL FELDMAN
President and Publisher
InsuranceNewsNet.com and InsuranceNewsNet Magazine

Discover some of the latest magnetic marketing strategies that are working online to attract leads and generate new business.

Paul has built an impressive audience since he launched InsuranceNewsNet in 1999. Over 600,000 visitors each month have made InsuranceNewsNet.com the No. 1 ranked insurance news website on Google. Add to that 50,000 magazine subscribers and another 250,000 email subscribers - for a total of more than 966,000 touch points with producers each month. Paul will share with you the secrets he's learned on how to generate an engaged audience and convert them into sales.

Over the past 3 years, Paul and his team have created more than 4,000 advertising campaigns, which have generated over 140,000 agent leads for carriers, marketing organizations, and other businesses. In 2012, Feldman was recognized as one of two finalists for min's "Marketer of the Year," a competition that includes all magazines, appearing alongside magazine publishing giants, including Time Magazine and Hearst.

"Do You Like Black Licorice?"

RON LOVE
Business Owner
Circle Heart, LLC

A stockbroker for 15 years, Ron suffered a heart attack and stroke in February of 1995. Unable to continue in his profession as a result of his stroke, Ron met this new adversity head-on. His family came together to face the challenge as a team, and rather than dividing them, it brought them closer together. After several years of recovery and writing about his experience, Ron rallied his family around the idea of a licorice company. At the time it seemed so simple—make licorice, sell licorice, cash paychecks. Everyone brought something to the table.

Today, Chateau D' Lanz, under the umbrella of Circle Heart, LLC., is truly a family company, under which several brands are managed, including Chateau D' Lanz Swiss Licorice, Molly Loves Candy, and Pillow Pack LLC, a company that supplies personalized candies for restaurants and hotels. In 2008, Chateau D' Lanz licorice was voted best of the Pacific Northwest by Seattle's Best Magazine and Chateau D' Lanz was voted "Best Licorice in the USA" by Vogue Magazine. Ron will share his story of recovery and his journey to find a new and meaningful life (with the help of his disability insurance policy) after suffering a massive stroke and heart attack.

General Sessions

SUNDAY, OCTOBER 12, 2014

Our 10th Anniversary!

"DI - Every Day - Everyone"

JENNIFER SMITH
Financial Services Representative
Principal Financial Group

Jenny Smith, a Des Moines, IA native, is a Financial Representative with the Midwest Region Business Center of the Principal Financial Group. She is a Perennial Club Qualifier, and wrote over 100 IDI cases in 2013. She was also in the top 1% of producers based on both lives and premium for Principal Life Insurance Company in 2013 and has been a small business owner for 13 years. In addition, she is a graduate of the West Des Moines Leadership Academy. Jenny currently lives in Des Moines, IA and is married with three children. Learn how to create momentum, negotiate success, and improve your sales productivity from one of the best DI producers in the country.

5th Annual Town Hall Meeting

Moderator

Steve Woods
Vice President, Senior Account Executive, Group and Specialty Reinsurance
Gen Re - A Berkshire Hathaway Company

Representatives from the Major Carriers hold an open Q&A session.

INTERNATIONAL DI SOCIETY
Producers Insurers Regulators Educators

1

BREAKOUT 1

"What Your Client *EXPECTS* to Happen On a Disability Claim vs. *REALITY*"

Art Fries, RHU
Art Fries and Associates

Art is an independent life and health broker in Nipomo, California. He has sold disability insurance for 30+ years, with 20 of those years mostly to attorneys in the Los Angeles area. Fries also acts as a consultant/negotiator with respect to new disability claims, problems related to existing disability claims or those that are terminated by the insurance company. He also provides advice to claimants related to disability claim buy-outs. Since 1995 he has provided Disability Claim Advice to 750+ individuals nationally and has secured over 1.5 billion dollars in current and future benefits for disability claimants. He is a Licensed Life & Disability Broker (no longer active in sales) Registered Health Underwriter, and graduated from Syracuse University with a Bachelor's Degree. He has been a Disability Claim Consultant to physicians, dentists, attorneys, and high end executives/salespeople. In addition, he is a Life Member of the leading producers Round Table (NAHU), a Former Member of the Million Dollar Round Table, and a national speaker/author in subjects related to disability insurance (sales/claims - 100+ articles). He is also a recipient of the Distinguished Service Award by DITC (NAHU) for "overall contribution to the disability industry". He is a founding member of the International DI Society.

2

BREAKOUT 2

"DI Buy Out & Key Man DI to Fund Buy Sell Agreements"

Includes Case Studies & How to Prospect For Business

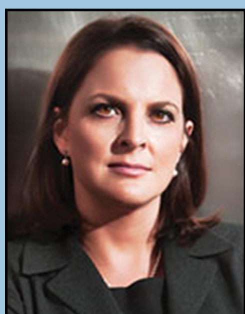
Howard Udoff, RHU, CLTC
Senior Vice President of Brokerage
International Planning Alliance

Howard attended the University of Maryland, and graduated in 1978 with a Bachelor of Arts degree in Psychology. He joined The Paul Revere Insurance Group in 1979 as a Brokerage Representative. In 1982, Howard was appointed Sales Manager of the Richmond, VA office. His success in Richmond propelled his appointment to General Manager of the New Jersey Brokerage office in 1986. Howard's responsibilities as General Manager were to oversee individual and group brokerage operations for the New Jersey territory. In 1996, Howard was appointed the General Manager of the combined Brokerage and Group office for New Jersey. He joined Guardian and Alter & Co, Inc., an agency of Guardian, on May 27, 1997 as Executive VP/Brokerage Director. He presently is responsible for overseeing all Disability and Long Term Care business for International Planning Alliance, LLC. Howard was an active member of the Newark Association of Life Underwriters, where he is a Past President. He has served as Secretary/Program Chair for the Northern New Jersey GAMA Associates (1992-93), and has moderated the LUTC course for 12 plus years. He is also a Founding Member of the International DI Society. Howard received his Registered Health Underwriters designation in 1987 and he is also certified by the Corporation for Long Term Care and holds CLTC designation since 2007. Howard has won the Elite Disability Specialist of the Year Award three out of four years, and he is a member of AHIA, NAHU and MDRT. He has qualified for Leaders Club every year since joining Guardian in 1997.

Our 10th Anniversary!

BREAKOUT 3

"Sales Success Panel—Ideas from the Agent's Perspective"

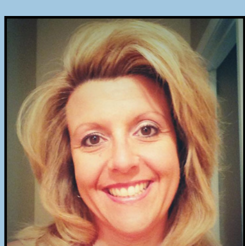


Jamie K. Fleischner, CLU, ChFC, LUTCF
President, Set for Life

Jamie started in the insurance industry in 1993 while attending college. Early in her career, she learned firsthand the importance of disability and life insurance when she was the primary caretaker for her mother who eventually passed away while waiting for an organ transplant. Since then, she has used her experience and passion to help her clients protect themselves from life's biggest risks. In 1999, she opened the doors to Set for Life Insurance.

Jamie is a graduate of Washington University in St. Louis. She holds a number of professional designations: LUTCF (Life Underwriter Training Council Fellow), CLU (Chartered Life Underwriter), and ChFC (Chartered Financial Consultant). She has been published in multiple publications, including Life Insurance Selling Magazine, LocumLife, and AgentSalesJournal (ASJonline). She was featured on the front cover of AgentSalesJournal (ASJonline) in 2010. She served on the board for 10 years and as President of NAIFA-Denver (National Association of Insurance and Financial Advisors) from 2001-2002 - the youngest president in the association's 100+ year history. Jamie is recognized as one of the top disability insurance brokers in the country.

Jamie has received numerous local and national industry awards, including the Wes Whitney Memorial Award, multiple Million Dollar Round Table Court of the Table Qualifications, Guardian Life Hall of Fame Lifetime Achievement Award, and the Principal Financial Group Quality Producer Award. She received local recognition as one of the top insurance advisers in 2009, 2010, 2011, and 2012 by Denver's prestigious 5280 Magazine.



Sheryl Brown-Madjlessi
Social Media Coordinator, Ash Brokerage

As the Social Media Coordinator at Ash Brokerage, Sheryl Brown - Madjlessi is responsible for implementing and maintaining marketing strategies with a resourceful approach to support a public diplomacy outreach initiative to engage and build online communities with financial services audiences. In addition, support all marketing teams with research, data analysis, online social network management, promotional activities, and timelines of marketing content. Bringing an online presence as the Social Media Coordinator for Ash Brokerage is another way to impact and enhance the practices of those in the financial services profession. As a six year old child, Sheryl lost her mother to lung cancer. It's is a passion of hers to tell the insurance story every day so it helps others plan for unexpected events.

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BREAKOUT 4

“LTD and IDI…Can We Talk?”

Kenneth Bloch, Sr., CLU
The Bloch Agency, Founder

Ken Bloch Sr., CLU, is the founder of The Bloch Agency, and also one of the founding partners, past president, and an active member of The Plus Group, the nation’s premier disability marketing organization. Ken has over 40 years of experience in the insurance industry, 35 of which were in the IDI market. He is regarded as an industry leader and participates on several field advisory committees for major disability income companies developing new "state of the art" disability income products and streamlined underwriting procedures. He has been published in Life Insurance Selling, Broker World, BenefitsPro and The Charlotte Observer, and has been a Keynote speaker at the Disability Income Officers Roundtable.

Nate Bearden
Employee Benefits Manager, The Standard

Nate is the Employee Benefits Manager for Nashville, TN and all of North & South Carolina. He has been the employee benefits manager since March of 2007. Nate started his Standard career as an employee benefits consultant over 15 years ago and his primary responsibilities include management of sales and service teams in the Nashville, Raleigh and Charlotte offices. His 18 years of industry experience in the ancillary, medical and pension field allow him to bring a comprehensive outlook to the employee benefits marketplace. Nate earned his bachelor’s degree in business management with a minor in applied organizational design from Tusculum College in Greenville TN. He has improved his skills with training as a professional negotiator, The Wharton School of Business, Series 6, 7 & 63 licenses and several professional presentation skills certifications. He resides in Charlotte, NC with his wife and two daughters.

Continuing Education

MONDAY, OCTOBER 13, 2014

Hour of Power

Two - 1 Hour Continuing Education Courses

(Attendees can participate in one of two)

1

COURSE #1
1 HOUR OF CONTINUING EDUCATION

"Business DI"

Sandy Lipsman
Regional Director IDI Sales
The Standard

Sandy is responsible for IDI sales, profitability, and persistency, and distribution channel oversight including MGAs, Employee Benefits office relationships, and National Marketing Agreements.

2

COURSE #2
1 HOUR OF CONTINUING EDUCATION

"Trends in Disability Sales"

Donald J. Schamay, CFP®
Disability Income Regional Vice-President
Principal Financial Group

Don is dedicated to helping producers in the states of Georgia, Tennessee and South Carolina (excluding upstate) grow their individual disability insurance sales with Principal Life Insurance Company.

Speed DI

TUESDAY, OCTOBER 14, 2014

Our 10th Anniversary!

9:30-11:30 am

Six 15-minute Fast Paced Sessions to Close Out the 10th Annual IDIS Conference!

immediately following the Annual Meeting (9:00 am)

TABLE 1

"HOW CAN THE INTERNATIONAL DI SOCIETY HELP YOU AND YOUR BUSINESS?"

This presentation will cover member benefits offered by the International DI Society and how you can tap into them to increase your bottom line.

Maureen Kirschhofer, CLU, ChFC
Owner
DOC-DI

Maureen Kirschhofer, CLU, ChFC is a financial professional with over 30 years of experience in Individual and Group Life, Disability and Long Term Care Insurance for Professionals and Business Owners. Since 2000 she has been owner of Kirschhofer and Associates in Jacksonville, FL. Prior to opening her own firm, she was a manager with Paul Revere for nine years. Her Specialties include Individual Disability Insurance, Buy-Sell Planning for professionals, Estate Planning, Business Overhead Insurance, and Excess Disability Insurance. She also works with Professionals and Business Owners to provide the best solutions to their financial situations. In addition, in January of 2010, she also founded DOC-DI with her business partner, Judi Garwood also located in Jacksonville, FL. Judi and Maureen work together to find the best options for Physicians and other Health Professionals. She is also a founding member of the International DI Society, a long-time board member and Immediate Past President.

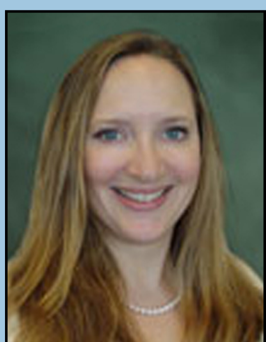
Greg Nelson, ChFC, CEBS, GBDS, DIA
Owner
Strategic Benefit Coach

Greg Nelson ChFC, CEBS, DIA has been specializing in individual and small group benefits planning for the medical, dental and chiropractic industries for over 25 years. With his company, Strategic Benefit Coach, he educates prospects and clients on how their insurances work together and empowers clients to make informed decisions that best meet their protection needs. Greg is a Court of the Table MDRT member, with disability insurance for professionals being the biggest key to his success in reaching that accomplishment.

TABLE 2

"THE DUTIES OF AGENTS AS THEY SUPPORT THEIR CLIENTS THROUGH THE CLAIMS PROCESS"

This presentation will cover the application process and avoiding future rescission claims, the duties of the insurance company during claims investigations, the duties of the insured during investigation, the difference between ERISA policies and individual disability policies (or "What is ERISA?"), and the litigation process…what agents can expect.



Stacy Tucker, Esq.
Partner
Ropers, Majeski, Kohn, and Bentley Lands

Stacy Tucker is a partner in the firm's Redwood City office. She specializes in the representation of insurers in ERISA, bad faith and coverage litigation. Her past representations include property and liability claims brought under homeowner, automobile and commercial policies, as well as disability insurance bad faith claims and numerous ERISA claims. Ms. Tucker also has significant experience in employment litigation, including advising on and litigating complex compensation disputes and handling related SEC investigations, heading internal whistleblower investigations and defending against the related government investigations, wrongful termination lawsuits and advising on executive employment issues and corporate governance responsibilities under Sarbanes-Oxley. She has particular expertise in the intersection of employment law and intellectual property protection, including the protection of trade secrets from employee or competitor theft, as well as privacy and data protection issues. Ms. Tucker has extensive appellate experience and has filed successful appellate briefs before the Sixth, Seventh, Ninth and Federal Circuits. Ms. Tucker obtained her J.D. from the University of Chicago Law School and her Bachelor of Arts degree from the University of Chicago, from which she graduated cum laude with honors in the History, Philosophy, and Social Studies of Science and Medicine. She is admitted to practice before all state and federal courts in California and Washington, including the California Ninth Circuit Court of Appeals. She is also admitted to the District of Columbia Court of Appeals.

TABLE 3

"MAKE IT SIMPLE!"

This presentation will cover simplified underwriting comparisons of disability carriers.

Bart Spencer
Director of Disability & Long Term Care
Allegis Advisor Group

When some people think of Disability Insurance (DI), they think of Bart Spencer, The DI Nut. Specializing in Disability Insurance, Bart thinks, eats and sleeps DI. His license plate even says, "DI NUT". Bart has recently been appointed the director of disability income and long term care for Allegis Advisor Group in Salt Lake City, Utah. His focus will be spent in how producers may increase their incomes by introducing their clients to disability income protection and long term care. Bart has presented for the Utah Health Underwriters Association on several occasions. Additionally, he has spoken at the LIMRA conference and at the International DI Society meeting. He has been a regular presenter at Grant Taggart Symposium and at numerous NAIFA events.

TABLE 4

"THE RIGHT POLICY FOR RIGHT NOW: DI FOR THE RISK TOLERANT"

The presentation will be a quick overview of how we need to change our quoting procedures from the traditional DI marketplace, when working with the "middle market". Bryan will demonstrate how a "good, better, best" approach can assist producers who work in this market to provide the right policy, right now, for a prospect.

Bryan Orr
National Sales Manager
Mutual of Omaha

Bryan began in the insurance industry 14 years ago, as a producer for a Professional Employer Organization in Chicago, specializing in group health, disability, and worker's compensation for companies with less than 200 employees. He then expanded his experience by working at First Health in Downers Grove, IL, focusing on group health, disability, and stop-loss protection for companies with at least 1,000 employees across the country. In 2004, Bryan was recruited by MetLife, and transitioned from the group market to the individual-first with fixed & variable annuities, and then as a disability wholesaler for IL & WI. At MetLife, Bryan became an expert at finding and placing Guaranteed Standard Issue (GSI) cases for producers.

In 2009, Bryan joined the sales team at Disability Resource Group - a national disability general agency in Chicago. It was here that his skills and experience in disability product translated well to providing conceptual tools producers could use to sell individual DI and GSI. Bryan served as the resident DI expert at many of his clients' offices, selling the concept of DI directly to the consumer.

As the National Sales Manager for Brokerage DI at Mutual of Omaha, Bryan has facilitates numerous educational seminars on disability protection, varying from the simple need of protection for one's paycheck, to detailed policy definition and advanced strategy. His experience has provided him with the unique ability to translate the value of disability protection to producers and clients of any size and scope.

TABLE 5

"STAND AMONG THOUGHT LEADERS WITH IDIS SOCIAL MEDIA"

This presentation will cover an important benefit of IDIS membership, that of social media networking opportunities. Learn how you can regularly receive news and information as well as participate in discussion forums with seasoned veterans along with new talent, all focused on disability insurance. The IDIS membership welcomes your contribution and expertise, and if you have been thinking about getting involved in social media, but are perhaps unsure as to how to get started, this would be a great introduction.

Ryan Petersen
Petersen Insurance Specialties, Inc.

Ryan began his insurance career in 2010 when he worked as an independent Life & Health insurance producer with an emphasis in serving the entertainment industry. Having strong roots in insurance, Ryan soon learned that he enjoyed working in his family's area of business and in 2012 he joined Petersen International Underwriters' marketing department where he took on the task of increasing the firm's digital presence. In 2013, he and his father, Mark Petersen, founded Petersen Insurance Specialties, Inc. to begin pursuing new ventures in the insurance industry. Ryan has had several articles published in a number of trade journals and is an active member of certain industry associations, currently serving on the board of The International DI Society as Social Media Director.

Speed DI

TUESDAY, OCTOBER 14, 2014

Our 10th Anniversary!

TABLE 6

"5 WAYS TO BOOST YOUR DI SALES"

This presentation is based on Corey's article in the December 2013 issue of *InsuranceNewsNet* Magazine. The presentation will give you solid information that you can share with your clients to insure they get the disability income they need.

Corey Anderson
Secura Consultants

Corey Anderson joined Secura Consultants in March 2000 as an assistant in new business. By September of 2000 he became the brokerage representative, calling on advisors helping them with income protection and long term care for their clients. In June of 2003 he transitioned from being a Secura Consultant employee to being the in-office Everyday Risk Manager, where his primary focus is helping advisors and their clients with reviewing and implementing plans. Many advisors love working with him as he handles everything from start to finish and keeps them informed on where he is at in the process with their clients.

Corey Anderson has been a featured speaker at numerous industry meetings speaking on his favorite topic, disability insurance. He has co-authored and starred in one of NAIFA's (National Association of Insurance & Financial Advisors) Programs in-a-box videos on Disability Insurance.

His placement ratio of clients submitted to underwriting continues to be over 95% year after year (industry average is 60%), and he is part agent on numerous individual (disability, long term care or life) insurance applications per year. He qualifies for the Million Dollar Round Table. He has achieved National Sales Achievement and National Quality Award through NAIFA and has been a member for over 13 years. He also qualifies for the Leading Producers Round Table at the Golden Eagle level through NAHU (National Association of Health Underwriters) and has been a long time member. He is a passionate, energetic, young agent who brings a different perspective on this business to his audiences.

He is a proud involved member of the International Disability Insurance Society (IDIS). Also, he is a member of Financial Planning Association of MN (FPA). In September 2012 he was a featured speaker at LIMRA (Life Insurance Marketing Resource Association) presenting in front of the disability company's home office personnel. Most recently he was asked by one of the top disability insurance carriers in the market to be on the field advisor board. (Only 7 representatives from the field are on it nationwide.)

October 11th–14th, 2014

Gaylord Opryland Resort & Convention Center • Nashville, TN

Registration fee includes:

- All General Session Presentations, Full Day of Breakouts, Speed DI
- CE credits (pending approval)
- Opening Night Reception/Meet and Greet with Exhibitors and Sponsors
- Breakfast Sunday, Monday and Tuesday
- Lunch Sunday and Monday
- 10th Anniversary Celebration, Reception and Awards Banquet

Registration

☐ $625.00 IDIS Members ☐ $775.00 Non-Members
(Pricing is good until September 19)

First Timer's Package

☐ $595.00 Includes Full Registration for the Conference and One Year of Membership
(Pricing is good until September 19)

Guests

☐ $350.00 *(Available until September 19)*

Carrier/Company Discounts

Call the IDIS offices for more details and to register.
(Available until September 19)

After 9/19—All registration is $850.00

REGISTRANT INFORMATION

Name	
Company	
Address	
City/State	
Office Phone	
Email Address	

CREDIT CARD INFORMATION

Type ☐ Amex ☐ VISA ☐ MC ☐ Discover

Credit Card #	
Expiration Date	
Billing Address	
Zip Code	
CCID	

Fax with credit card information to DI Society fax (562) 493-1022 or mail completed registration form and check to: 12340 Seal Beach Blvd., #B357, Seal Beach, CA 90740. Secure online registration with credit card is also available.