BARRY J. FISHER
INSURANCE MARKETING
A Borden Hamman Company

Long-Term Care Insurance
Thought Leaders Symposium

January 30, 2014

El Caballero Country Club
18300 Tarzana Drive, Tarzana, CA 91356
(818) 654-3000

Featuring

Scott McKay
Sr. Vice-President – Business & Product Strategies
Genworth Financial

Linda Fabian
National Director of Sales
LifeSecure

Ronald R. Hagelman, Jr.
Member Society of Actuaries Long-Term Care Section
Vice-Chair Long-Term Care Think Tank
America's Long-Term Care Insurance Experts

REGISTER HERE

Long-Term Care Insurance

Thought Leaders Symposium

January 30, 2014

Overview

Many of the smartest people in long-term care financing, care delivery, planning and insurance have been working on the vexing issues we face regarding our rapidly expanding aging population. The Federal Commission on Long-Term Care, the Society of Actuaries and insurance industry leaders have spent countless hours devising solutions to this multi-faceted problem. All strongly agree that the need for long-term care is growing and that we must proactively create financial and care alternatives for a variety of circumstances.

Barry J. Fisher Insurance Marketing is pleased to present our ***2014 LTCi Thought Leaders Symposium*** featuring some of the most influential people in the long-term care insurance business today. Our half-day event will present the most significant findings from the latest research in long-term care, and we'll propose solutions for the looming long-term care crisis. The good news is that our industry is not standing still, but there is much work to do. Even better, insurance agents will be in the forefront of delivering meaningful solutions to their existing clients and to a broader population ready for innovative answers.

One of the best parts of the ***2014 LTCi Thought Leaders Symposium*** is the "talk-show" style format we'll employ. Each presenter will make opening comments and then will answer questions from one of our moderators and the audience. You can be an active participant in shaping the future of long-term care insurance as it solves the financial needs of consumers.

There's more to our Symposium than just facts, figures and concepts. We will also show you how to seamlessly integrate new marketing and sales messages into your day-to-day insurance practices so you can achieve long-term care planning and sales success.

REGISTER HERE

Here's What You'll Learn

- The latest research from thought leaders about long-term care and its impact on American society;
- The good news in the LTCi industry: what credible companies are doing to adapt and innovate for current and future environments;
- New ways of thinking about long-term care planning and the role of insurance;
- The critical role insurance agents must play in expanding access to long-term care planning products;
- How you can tap into the lucrative group LTCi market with simplified products and underwriting;
- How to automate your marketing efforts for easier and more frequent sales;
- Why Barry J. Fisher Insurance Marketing is the industry leader in long-term care insurance brokerage and innovation.

REGISTER HERE

Don't miss this chance to participate in the conversation! Get your questions answered by industry leaders, and propose ideas of your own for their consideration.

Presenters & Moderators

REGISTER HERE

Scott McKay
Senior Vice-President Business & Product Strategy
Genworth Financial

There's no question that Genworth is the industry standard in long-term care insurance. Their leadership is essential to a healthy marketplace. As Genworth's U.S. Life's Senior Vice President of Business & Product Strategy, Scott is responsible for leading the development, design and implementation of the company's life, long term care insurance and fixed annuity products. Since 1993, he has been a key player helping build Genworth Financial, performing a variety of business roles involving technology, servicing, marketing, and acquisition integration.

In addition to his role in the U.S. Life segment, Scott maintains leadership for Genworth Financial's Technology strategy as CIO for the company.

Prior to 1993, Scott spent 10 years consulting in the Insurance and Financial Services industries working with technology, operations, quality, marketing, and product development. He obtained a Bachelor of Science in Computer Science from West Chester University of Pennsylvania.

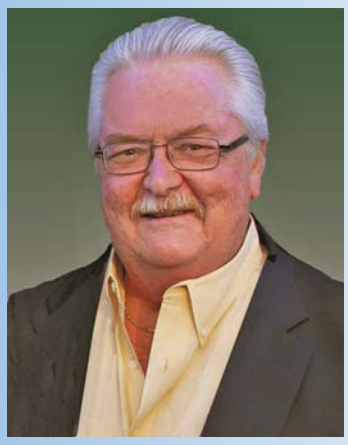
Linda Fabian,
Director of National Accounts
LifeSecure

Providing simplified and credible long-term care insurance products to the employer market has been challenging in recent years. That's why LifeSecure is such an important force in our industry today as they offer the best value in employer sponsored multi-life LTCi.

Linda Fabian joined LifeSecure's sales team in 2010 to lead their National Accounts business. She has over 10 years of LTC experience working for large carriers and brokerage firms.

As the Director of National Accounts, Linda is responsible for driving national sales strategies and developing new business in the large group and association markets covering multiple states. She provides her clients extensive product knowledge and exceptional customer service. Over the years, Linda has built many strong client relationships that allow her to expand sales with existing customers and grow new business with others.

Linda holds a Bachelors of Science Degree in Pharmacy from Duquesne University. She and her husband Philip reside in Scottsdale Arizona.



Ronald R. Hagelman, Jr.
Co-Chair of
The Society of Actuaries "Future of LTC Think Tank"

If you've ever read *Broker World Magazine*, or been to a national sales meeting on long-term care insurance or to one of our training meetings, you've met the indefatigable Ron Hagelman, CLTC, CSA, LTCP. Ron is the President of *America's Long-Term Care Insurance Experts* in New Braunfels, Texas, a nationally-recognized LTCi marketing organization representing more than 35 general agencies. He has led exclusive product development and marketing for several insurance companies and was the driving force behind the introduction of State Life's long-term care insurance product.

Ron has served on the Society of Actuaries (SOA) Interdisciplinary Organizing Committee for seven years and has been its Marketing Chair and Group Co-Chair. Ron is currently an affiliate member of the LTC Section Council of the SOA, and participates in several SOA working committees. He's also past president of the American Association for Long Term Care Insurance, a frequent author and motivational speaker.

REGISTER HERE

Michael Ashwill
Chief Marketing Office
Borden Hamman Insurance Marketing

Michael graduated from Baylor University with a Bachelor's in Business Administration. He spent six years with the Southwestern Company where he was a top recruiter, manager, and sales force leader. He joined Borden Hamman in 2006 and became Vice President of Life & LTCi Marketing in early 2011. He was promoted to Chief Marketing Officer in May 2012. He oversees the Life, Annuity & LTCi Marketing teams and assists agents daily with life insurance strategy, case design and underwriting.

Moderators

Barry J. Fisher
Executive Vice-President
Borden Hamman Insurance Marketing

For more than two decades, Barry has been one of the nation's leading wholesalers of long-term care insurance. Founder of Barry J. Fisher Insurance Marketing, Inc., he now serves as an Executive Vice-President of *Borden Hamman Insurance Marketing, Long-Term Care Insurance Division*. He is also the Executive Vice-President of *America's Long-Term Care Insurance Experts*, a national LTCi marketing organization representing more than 35 life and health insurance brokerage agencies.

Barry has served as President of the Los Angeles and California Associations of Health Underwriters and in various roles including CAHU Vice-President of Legislative Affairs and CAHU-PAC Chairman. In 2002 the California State Legislature recognized him for his leadership in legislative advocacy in the fields of health care and long-term care, and in 2003 he received the National Association of Health Underwriter's Legislative Achievement Award. In 1999 Barry co-founded the American Association for Long Term Care Insurance ("AALTCi"). As AALTCi's first President, he initiated the creation of the Long-Term Care Professional (LTCP) designation and helped make long-term care insurance a mainstay product offering for life and health insurance agents.

REGISTER HERE

Susan M. Blais
Executive Vice-President
Borden Hamman Insurance Marketing

Susan was the Chief Operations Officer of Barry J. Fisher Insurance Marketing, Inc. ("BJFIM") for seven years prior to merging with Borden Hamman Insurance Marketing in 2013. For the 26 years prior to joining BJFIM, she led a successful career in the health insurance industry. She began in business-to-business sales at Group Health Cooperative of Puget Sound and retired as senior executive of a billion-dollar division of PacifiCare Health Systems, a Fortune 100 company. She held senior management roles in sales, marketing, product development, and operations at TakeCare Health Plans, FHP, and WellPoint Health Networks.

Susan has worked in every market segment from individuals to national accounts, and has a deep understanding of the worksite sale and the role of the independent insurance producer. Her background in implementing technology has enabled her to upgrade and update systems with a focus on user friendliness.

Susan has served on the boards of several organizations, including American Red Cross of Ventura County, California Association of Health Plans, California Association of Health Underwriters (Inland Empire and Los Angeles Chapters), MaxiCare Health Plans, Inc. and Phillips Graduate Institute.

Agenda

7:30 am to 8:15 am **Registration & Breakfast**
(Full buffet breakfast)

8:15 am to 8:35 am **Welcome, introductions and opening comments**
Barry J. Fisher, LTCP

8:35 am to 9:05 am **"Land That Plane" Survey – Society of Actuaries**
Presentation and Discussion of Key 2013 Think Tank Results
Ronald R. Hagelman, Jr., CLTC, CSA, LTCP
Audience Participation, Q & A Lead by Barry J. Fisher

9:05 am to 10:05am **Bringing the Past, Present and Future into Focus**
Presentation and Discussion of Industry Environment and Genworth's efforts to innovate products and evolve long-term care planning
Scott McKay, Sr. Vice-President, Genworth Financial
Audience Participation, Q & A Lead by Barry J. Fisher

10:05 am to 10:20 am **Break**

10:20 am to 10:35 am **Innovate Your Marketing with Borden Hamman**
Fast and Easy Ways to Innovate, Automate & Diversify Your Marketing with tools from Borden Hamman Insurance Marketing
Michael D. Ashwill, Chief Marketing Officer, Borden Hamman

10:35 am to 11:35 am **Alive & Well – Small Group LTCi & LifeSecure**
Discussion of Small Group (Multi-Life) Opportunities in LTCi
Linda Fabian, National Director of Sales, LifeSecure
Audience Participation, Q & A Lead by Susan M. Blais

11:35 am to 12:15 pm **Wrap-Up Roundtable Discussion Featuring All Presenters**
Audience Participation, Q & A Lead by Barry J. Fisher & Susan M. Blais

Tuition Guidelines

- **Early Bird Registration $25 through January 17th (credit card online)**
- Late online registration $40
- At the door registration $50
- Cancellation policy – Full up to January 24th – Nothing thereafter
- Tuition Refund for business (proposed)
  - *Submitted Genworth application (IGO) by March 30, 2014*
  - *Submitted individual LifeSecure application by March 30, 2014*
  - *LifeSecure Group Pre-Qualification form by March 30, 2014*