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**CFDD 2008 WHOLESALER TRAINING
TOPIC DESCRIPTIONS**
(October 12, 2008)

***“AN INDUSTRY IN TRANSITION:
Old Model Is Mature, New One Is An Infant”***

October 13-15, 2008 (Monday -Wednesday)
The Fairmont Scottsdale Princess
Scottsdale, Arizona

Sunday, October 12, 2008

11:00 am –

*Kierland Golf Club
15636 North Clubgate Drive
Scottsdale, AZ 85254
(480) 922 9283*

Charity Golf Event

Benefits to the Injured Marine Semper Fi Fund

10:15 am – 2:00 pm

*Conference Center's Hotel
Satellite Registration Desk*

Pre-Conference Registration Desk Opens

12:15 – 6:45 pm

TBD

PRE-CONFERENCE WHOLESALER TRAINING
For Wholesalers Only

Sunday, October 12, 2008 (Pre-Conference Continued)

12:15 – 1:30 pm

Hacienda Plaza & Trellis

KEYNOTE SESSION

Plan Design & Emerging Trends

-Fred Reish, Managing Director, Reish Luftman Reicher & Cohen
(Sponsored by ING Retirement Services)

Plan design and fiduciary responsibility, two requisites for successful plans, will be the focus of this program. Roth accounts, automatic enrollment, safe harbor automatic enrollment, cross testing and other opportunistic and popular features are some of the specific plan design elements that will be covered. Fiduciary responsibility issues such as investment solutions for participants, QDIAs, fees, expenses and revenue sharing, including 408(b)(2) disclosures & Schedule C reporting, will also be discussed. Additionally, the session will address implementation procedures for these and future changes, gap analysis as well as how providers can help advisors adapt.

1:30 – 1:45 pm

TBD

Break

1:45 – 2:45 pm

TBD

Basic Training for Wholesalers

-Gary L. Anderson (Moderator), Midwest Regional Pension Manger,
Stancorp Equities Inc.
-Scott Waite, Regional VP, John Hancock Retirement Plan Services
-Dany Yonan, Regional Director of Retirement Services,
ING Retirement Products

Three of the industry's most successful wholesalers, Gary Anderson (The Standard), Scott Waite (John Hancock) and Dany Yonan (ING), will share their candid observations about what it takes to be number one. Collectively, they have over fifty years of retirement plans experience. *Each member of this distinctive presentation has been a salesperson of the year and either changed firms or opened a new territory during the last 18 months.* Join this session and learn the unique approaches used by each panelist to develop and implement a successful business strategy. Gary has trained over a dozen rookies, most of whom have gone on to be successful wholesalers at various companies. As an added bonus, he will share insights into the skills and attributes he seeks in candidates along with sales activities and behavior that have consistently generated business.

Sunday, October 12, 2008 (Pre-Conference Continued)

2:00 – 10:00 pm

*Conference Center's
Outside – Porte Cochere*

Conference Registration Desk Opens

2:45 – 3:00 pm

TBD

Break

3:00 – 4:00 pm

TBD

Closing Larger Retirement Plans Business
-Ann Schleck, Principal, Ann Schleck & Co.

As RIA's and Advisors move up-market, they often look to wholesalers for guidance on effective sales strategies. Tips and techniques proven to help sales teams win more retirement plan business will be revealed in this session. Learn what large plan sponsors look for when they hire service providers, how to conduct a prospect needs analysis, a pursuit strategy and discover ways to communicate your team's ROI to prospects. Winning approaches to final presentations will also be shared during this presentation.

4:00 –

Conference Center

Exhibitor Setup

4:00 – 4:30 pm

TBD

Snack/Beverage Break

Sunday, October 12, 2008 (Pre-Conference Continued)

4:30 – 5:30 pm

TBD

What Advisors Want From Wholesalers:

View From The Trenches

- Thomas Herbruck (Moderator), VP, Financial Services, Herbruck Alder
- Samuel Brandwein, VP, Wealth Management, Smith Barney
- Stace Hilbrant, Managing Director, 401kAdvisors LLC, (NRP Member)
- Mark Paone, Corporate Retirement Director, Citi Inst'l Consulting

Get a rare look inside the heads of four successful retirement plan advisors and learn what they really want from wholesalers. *As former wholesalers, each member of this panel is uniquely qualified to communicate advisor needs & help wholesalers craft a door opening message.* In this view from the trenches, the panelists will share what works and what doesn't. They will candidly discuss their pet-peeves and experiences with both outstanding and less than satisfactory wholesaler performance. In addition to answering questions, the panelists will share what they learned as advisors to help wholesalers improve their performance and establish new business relationships. This presentation provides wholesalers with fifty years of valuable insights into developing winning relationships with productive advisors.

5:30 – 5:45 pm

TBD

Break

5:45 – 6:45 pm

TBD

The Efficient Retirement Plans Wholesaler

-Ami Tully Lotka, President, Maximum IMPACT Partners

This session will give wholesalers the tools to identify and select advisors who are future top producers. Learn how and when to decline advisor requests as well as determine the frequency of visits in order to maintain a good relationship. Effective methods for balancing schedule demands while retaining sufficient territory coverage will also be reviewed. This interactive session will include group discussions and case studies as well as provide you with the skills to be a more efficient retirement plan wholesaler.

Sunday, October 12, 2008 (Pre-Conference Continued)

7:00 – 9:30 pm

Princess Plaza Courtyard

**Kick-Off/Charity Golf Event Awards Party
Sponsored By Russell Investments**

- Golf Awards/Sponsor Recognition
 - Music, Food, Cocktails & Entertainment
 - Authentic His & Hers H-D Leather MotorClothes
Awarded To the Best Biker Attired at the Party
-

Tuesday, October 14, 2008

4:15 – 5:15 pm

TBD

Developing Business To Business Relationships (*Restricted To Wholesalers & Home Office Personnel*)
-Ray Henderson, Director, Business Health, PTY., Ltd.

Competitive products and performance are givens, but market cycles are a fact of life. Taking market vagaries into consideration, this session will address performance transcending steps wholesalers can take to build long term relationships with key advisors and TPAs. In addition to sharing what advisors and TPAs are really looking for, tips and strategies to help wholesalers distinguish themselves and build lasting business-to-business relationships will be provided.

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