Union League Club of Chicago • 65 West Jackson Boulevard • Chicago, IL 60604

Agenda: July 29th – July 31st

Thursday, July 29th

7:30 – 8:00 am Breakfast

8:00 - 9:00 am Opening remarks, Scott Hamilton, J.D. and Randy Fox, CFP

9:00 – 11:00 am Energy of Money – Maureen Warman, Life Enhancement Series- In "Energy of Money" you will learn the fundamental principles of working with one of the four life forces: Money. The skills you acquire will create new clarity and inspiration - not only in your financial life but in the ways you time manage, participate in relationships and nurture physical well-being!

11:00 – 11: 15 am Break

11:15 – 12:30 pm BDITs – Richard Oshins, Oshins & Associates, P.C.-The GDOT on steroids. Yes, sometimes there is a better solution than the traditional defective trust. The BDIT solves several problems that the GDOT simply can't Dick Oshins will explain the power of this incredible planning tool.

12:30 - 1:30 pm Lunch

1:30 – 2:15 pm P & C Review for High Net Worth Clients – Steve Berger, AON - Add value and separate yourself from the herd.

2:15- 2:30 Break

2:30 - 3:30pm Marketing Insurance- Using the ILIT Software with Randall Borkus and Kyle Hafstad

3:30 – 4:15 pm Positive Round

6:30 – 9:00 pm Food/Drink/Play

Friday, July 30th

7:30 – 8:00 am Breakfast

8:00 – 10:00 am Energy of Money – Maureen Warman, Life Enhancement Series- Part 2

10:00- 10:30 am Break

10:30 – 11:30 David Frohman- Income Tax Planning for Business Owners: Defined Benefit Plans- Is the all insurance plan still alive and well? New rules provide new opportunities that will enable advisors to help their business owner clients save significant amounts of income taxes while saving for their own retirement. Properly structured defined benefit plans can weigh the deferral heavily toward the ownership.

Noon - 1:30 pm Lunch

1:30 – 3:00 pm Case Study and Break Out Groups –Randall Borkus and Kyle Hafstad

Randall and Kyle will lead the case study for the group. They will review a comprehensive estate plan for a high net worth family. There will be discussion of the cash flows, income tax and estate tax implications of their current planning and participants will work in groups to determine possible solutions to apply to improve their planning. Discussion will revolve around integrating planning concepts including trusts, partnerships, life insurance, asset protection and other tools.

3:00 – 3:15 pm Break

3:15 – 4:00pm Getting Paid on a Family Charity Plan – Scott Hamilton, Andrew Sigerson, and Randall Borkus. See the calculations, the client advantage and the pay off for everyone involved. Start positioning your clients now--this is faster than a speeding bullet and more powerful than a CRT!

4:00 – 5:00 pm Positive Round

5:00 pm - Dinner on Your Own

Saturday, July 31st

7:30 – 8:00 am Breakfast

8:00 - 10:00 am Energy of Money – Maureen Warman, Life Enhancement Series- Part 3

10:00 – 10:15 am Break

10:15 - 11:30 am Positive Round and Wrap Up

11:30 am - Go Enjoy Our Beautiful City!

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Complete the registration form below.
Fax to 630-596-5099 or email: sue@inknowvision.com
For more information, go to www.inknowvision.com, or call 630-470-6485
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CHICAGO o JULY 29–JULY 31, 2010
Union League Club o www.ulcc.org

Registration
$3,000 for *Returning Members*
Or
$1,999 for *First Time Guests*

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Or mail to: InKnowVision, LLC 1111 South Washington Street, Naperville IL 60540 Fax registrations to: 630-596-5099

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CE Credits for CFP, IL Life, and CPE

Program Specifics
• Program level is intermediate.
• Prerequisites. Attendees should have a minimum of ten years experience in their respective fields, and sufficient knowledge and expertise working in the affluent market for Estate and Income Tax purposes.
• Instructional method is Group Live.
• The 21⁄2 day seminar will be approved for CPE credit hours subject to NASBA Board Approval

Program Refund and Complaint Resolution Policy
If a participant has a schedule conflict, every attempt will be made to enroll the person in an alternative program. Every effort will be made to resolve any complaints to the customer's complete satisfaction. For more information regarding administrative policies such as complaint and refund, please contact our offices at 630-596-5090 – Sue Hillstrom - Ext.85.
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