SESSIONS

PRE-CONFERENCE WORKSHOPS AND MAIN CONFERENCE DAY 1 - 09/11/2021

Registration and light breakfast

8:00am - 9:00am
PPLI/PPVA for investment managers

Registration and light breakfast

8:00am - 9:00am
PPLI for brokers, family offices, HNWIs, advisors, attorneys and CPAs

Maximizing the opportunities in PPLI/VA

9:00am - 9:45am
PPLI/PPVA for investment managers

Participants

Catrina Beauchamp - Investment Advisor Representative, Boulevard Family Wealth and Founder, Beaucoup Wealth and Insurance

Moderator: Richard Beleutz - CEO, AIR Asset Management

Modernizing estate planning with PPLI

9:00am - 9:45am
PPLI for brokers, family offices, HNWIs, advisors, attorneys and CPAs

Participants

Robert Amoruso - Founder & Managing Partner, Gideon Strategic Partners

Ken Masters - Principal, Winged Keel

Ann Marie Liotta - US Wealth Strategist / Producer, Cohn Financial Group

Dave Valcourt - Vice President, Client Planning, Financial Architects Partners

Moderator: Richard Baer - Co-Founder and CEO, Legacy Capital Group

Delivering your investment solution via PPLI/PPVA

9:45am - 10:30am
PPLI/PPVA for investment managers

Participants

Matthew Wosk - Founder, Partner, and Chief Executive Officer, Proficio Capital Partners

Moderator: Henry Bregstein - Partner, Katten Muchin Rosenman LLP

Jennifer Hamilton Macaulay - Managing Member, BHJ, LLC

Integrating PP products in your investment portfolio

9:45am - 10:30am
PPLI for brokers, family offices, HNWIs, advisors, attorneys and CPAs

Participants

Thomas Pauloski - Managing Director, Wealth Planning and Analysis, Private Client Group, Bernstein Private Wealth Management

Coffee break

10:30am - 10:55am
PPLI/PPVA for investment managers

Coffee break

10:30am - 10:55am
PPLI for brokers, family offices, HNWIs, advisors, attorneys and CPAs

How you do PPLI - rules and engagement for investment managers

10:55am - 11:35am
PPLI/PPVA for investment managers

Participants

Jason Orlosky - Managing Partner, Head of Asset Management, Bridgeway Asset Management LLC

How to buy, market and sell PPLI globally

10:55am - 11:35am
PPLI for brokers, family offices, HNWIs, advisors, attorneys and CPAs

Participants

Scott Diamond - Vice President, Senior Advisor, Schechter Wealth

Robert Colvin - Principal, Robert D. Colvin & Associate

Exploring the tax dynamics of PPLI

11:35am - 12:15pm
PPLI/PPVA for investment managers

Participants

Larry Herman - President, Herman Agency, Inc.

How family offices use PPLI

11:35am - 12:15pm
PPLI for brokers, family offices, HNWIs, advisors, attorneys and CPAs

•Strategies for working with SFOs and their representatives
•Assessing PPLI and repositioning significant blocks in portfolios

Participants

Ben Rainey - Partner - Denver, WealthPoint, LLC

Aidan Elliott - Client Advisor, WealthPoint, LLC

Networking lunch for workshop participants

12:15pm - 1:10pm
PPLI/PPVA for investment managers

Networking lunch for workshop participants

12:15pm - 1:10pm
PPLI for brokers, family offices, HNWIs, advisors, attorneys and CPAs

Chairman's opening remarks

1:10pm - 1:20pm
PPLI/VA - Main conference day 1

Participants

Jonas Katz - Principal, Chief Marketing Officer, SALI Fund Services

Examining the data – current trends and new opportunities in the PPLI and PPVA market

1:20pm - 1:50pm
PPLI/VA - Main conference day 1

- Year in review
- Outline of industry trends, current pros and cons, forward looking outlook
- Analytics highlighting pockets of market growth for the institutional and HNW channels

Participants

Cameron Vail - Chief Operating Officer, SALI Fund Services

PPLI/VA - Lessons learned from the pandemic

1:50pm - 2:10pm
PPLI/VA - Main conference day 1

- Newcomers to PPLI market – disruptors and innovators
- Common traps and misuse of PPLI
- The 7702-rule change
- Customised and co-mingled solutions

Participants

Ronald Diamond - Founder & CEO, Diamond Wealth

Michael Liebeskind - Principal, Golconda Partners, LLC

RIA Panel – case studies on utilizing PPLI for clients: what works, what doesn't, how it fits as part of a broader wealth management plan

2:10pm - 3:00pm
PPLI/VA - Main conference day 1

Participants

Moderator: Ken Foley - Managing Director, Wealth Management and Strategic Partnerships, Spearhead

Sarah Simon - Managing Director, Wealth Advisor, Cresset Capital

Richard Baer - Co-Founder and CEO, Legacy Capital Group

Jon Donfeld - President/Founder, Donfeld Insurance Services Corp.

Political outlook for insurance and wealth management

3:00pm - 3:30pm
PPLI/VA - Main conference day 1

Participants

Marc Cadin - Chief Executive Officer, Finseca

Networking and coffee break

3:30pm - 4:00pm
PPLI/VA - Main conference day 1

Institutional investors: the prospects, products and challenges for advisors, asset managers and carriers

4:00pm - 4:30pm
PPLI/VA - Main conference day 1

- Focus on individual products
- Control, ownership and legal challenges

Participants

Moderator: Henry Bregstein - Partner, Katten Muchin Rosenman LLP

Roundtable discussions

4:30pm - 5:15pm
PPLI/VA - Main conference day 1

Choose a discussion:

- Innovation in underwriting for products - Brian Koonce and Ken Masters
- New approaches to manage succession - Ann Marie Liotta
- Investment securities law and tax implications
- Offshore PPLI – the ins and outs - Robert Colvin
- PPLI to differentiate your RIA partnerships - Daniel Davies

Participants

Ann Marie Liotta - US Wealth Strategist / Producer, Cohn Financial Group

Robert Colvin - Principal, Robert D. Colvin & Associate

Brian Koonce - Field Vice President, Pacific Life

Daniel Davies - Regional Vice President, Individual Life Division, Prudential

Ken Masters - Principal, Winged Keel

Drinks reception

5:15pm - 6:15pm
PPLI/VA - Main conference day 1

SCHEDULE

PRE-CONFERENCE WORKSHOPS AND MAIN CONFERENCE DAY 1 - 09/11/2021

TIME	PPLI FOR BROKERS, FAMILY OFFICES, HNWIS, ADVISORS, ATTORNEYS AND CPAS	PPLI/PPVA FOR INVESTMENT MANAGERS	PPLI/VA - MAIN CONFERENCE DAY 1
8:00AM	**8:00am** - Registration and light breakfast	**8:00am** - Registration and light breakfast	
9:00AM	**9:00am** - Modernizing estate planning with PPLI **9:45am** - Integrating PP products in your investment portfolio	**9:00am** - Maximizing the opportunities in PPLI/VA **9:45am** - Delivering your investment solution via PPLI/PPVA	
10:00AM	**10:30am** - Coffee break **10:55am** - How to buy, market and sell PPLI globally	**10:30am** - Coffee break **10:55am** - How you do PPLI - rules and engagement for investment managers	
11:00AM	**11:35am** - How family offices use PPLI	**11:35am** - Exploring the tax dynamics of PPLI	
12:00PM	**12:15pm** - Networking lunch for workshop participants	**12:15pm** - Networking lunch for workshop participants	
1:00PM			**1:10pm** - Chairman's opening remarks **1:20pm** - Examining the data – current trends and new opportunities in the PPLI and PPVA market **1:50pm** - PPLI/VA - Lessons learned from the pandemic
2:00PM			**2:10pm** - RIA Panel – case studies on utilizing PPLI for clients: what works, what doesn’t, how it fits as part of a broader wealth management plan
3:00PM			**3:00pm** - Political outlook for insurance and wealth management **3:30pm** - Networking and coffee break
4:00PM			**4:00pm** - Institutional investors: the prospects, products and challenges for advisors, asset managers and carriers **4:30pm** - Roundtable discussions
5:00PM			**5:15pm** - Drinks reception

Networking breakfast

8:30am - 9:00am
PPLI/VA - Main conference day 2

Chairman's opening remarks

9:00am - 9:05am
PPLI/VA - Main conference day 2

Participants

Jonas Katz - Principal, Chief Marketing Officer, SALI Fund Services

Focus on carriers – creating, protecting and growing wealth for future generations

9:05am - 9:45am
PPLI/VA - Main conference day 2

Participants

Doug Peterson - Vice President, Prudential

Alan Jahde - President, Investors Preferred Life Insurance Co.

IDFs – focus on credit funds

9:45am - 10:30am
PPLI/VA - Main conference day 2

Participants

Richard Jacobson - Managing Director, Golub Capital

Aaron Peck - Managing Director, Portfolio Manager - Retail and High Net Worth Investment Funds, Monroe Capital LLC

Adam Hagfors - Founding Partner and Chief Investment Officer, Silverpeak Credit Partners

Moderator: Richard Beleutz - CEO, AIR Asset Management

Networking and coffee break

10:30am - 11:00am
PPLI/VA - Main conference day 2

How should you own assets?

11:00am - 11:30am
PPLI/VA - Main conference day 2

Participants

Ralph Sesso - Principal Owner and Portfolio Manager, Redwood Partners

Scott Hallermann - Director of Research, Redwood Partners

Reviewing new asset classes and what to consider

11:30am - 12:00pm
PPLI/VA - Main conference day 2

This session will profile the latest developments in PE/VC.

Participants

Edward Goldstein - Managing Director and Partner, Pennington Partners & Co.

Thomas Pauloski - Managing Director, Wealth Planning and Analysis, Private Client Group, Bernstein Private Wealth Management

End of conference and networking lunch

12:00pm - 1:00pm
PPLI/VA - Main conference day 2

SCHEDULE

MAIN CONFERENCE DAY 2 - 10/11/2021

Private Placement Life Insurance & Variable Annuities Forum - PPLI (US)

November 9-10, 2021
W Chicago City Center

TIME	PPLI/VA - MAIN CONFERENCE DAY 2
8:00AM	**8:30am** - Networking breakfast
9:00AM	**9:00am** - Chairman's opening remarks **9:05am** - Focus on carriers – creating, protecting and growing wealth for future generations **9:45am** - IDFs – focus on credit funds
10:00AM	**10:30am** - Networking and coffee break
11:00AM	**11:00am** - How should you own assets? **11:30am** - Reviewing new asset classes and what to consider
12:00PM	**12:00pm** - End of conference and networking lunch