



THE 2012

ARIZONA INSTITUTE



January 22-26, 2012 ~ Pointe Hilton Squaw Peak Resort ~ Phoenix, Arizona

Educational Sessions

For full session descriptions visit www.arizona-institute.com

MONDAY

8:00 a.m. – 10:50 a.m.

Trustees Can't Count: Why Beneficiaries Do Not Receive What the Decedent Wanted

Howard Sanger, JD, LLM, Law Offices of Sanger Manes, LLP

11:00 a.m. – 2:50 p.m.

Using an Annuity to Qualify for Medicaid Benefits

Dale M. Krause, JD, LLM, CEO, Krause Financial Services

TUESDAY

8:00 a.m. – 10:50 a.m.

Planning Opportunities with the Changing American Family

John A. Oliver, CLU, ChFC, Vice President, Field Development, Transamerica Life Insurance Company

11:00 a.m. – 2:50 p.m.

Captive Insurance Companies: The New Frontier

John Capasso, CPA, PFS, Managing Director, Captive Planning Assocs., LLC
David M. Henderson, CPA, JD, LLM, Member, Duggan Bertsch, LLC

WEDNESDAY

8:00 a.m. – 10:00 a.m.

Creating and Executing an Exit Plan: What You Need to Know and Do to Help Owners Leave Their Businesses in Style

John Brown, JD, President, Business Enterprise Institute, Inc.

10:00 a.m. – 12:00 p.m.

More Clients Now: How to Get Your Best Referral Sources to Work Harder for You

David Ackert, President, The Ackert Advisory

THURSDAY

8:00 a.m. – 11:00 a.m.

Staying Relevant in a Post-Tax Environment

Terence B. Stanaland, JD, ChFC, CPA, Of Counsel, Teague, Rotenstreich, Stanaland, Fox & Holt, PLLC

EDUCATION LEVEL

Intermediate to Advanced

Continuing Education Credits:

Earn up to 18 hours of insurance credits; up to 21 hours PACE, legal, CFP®, accounting, and banking.

PROGRAM FEES

	Early Registration (by 11/01/11)	Regular Registration (after 11/01/11)
Group Rate/3 or more.....	\$1049.....	\$1249
Regular Member.....	\$1299.....	\$1499

REGISTRATION

To register online go to

www.arizona-institute.com

Or call Member Services at

800-392-6900

to register or request a registration form
(M-F, 9:00 a.m. – 4:30 p.m. ET)

PROGRAM QUESTIONS?

Contact Sherry Chester at
800-927-2427, ext. 2510 or via
e-mail: schester@financialpro.org

RESORT INFORMATION

Standard accommodations: \$169 (plus tax)
single/double occupancy.

Reservations must be made **no later than December 29, 2011** to receive the Society's special Institute room rate. Reservations made after this date are subject to the resort's space and rate availability. Call the Pointe Hilton Squaw Peak directly at 800-HILTONS and request the "Society of Financial Service Professionals" rate.

The Pointe Hilton Squaw Peak Resort

