

*This publication made possible
by*



FI Toll Free: 1.800.448.0035
Local: 561.995.8200
www.totalbrokeragesolutions.com
Formerly the Sahn Life Agency

Dates to Remember

April 23, 2009

**Topic: Gifting Strategies that
Make Sense in 2009**
**1 hr. Insurance, CFP & CPE
credit**

Rob Gergiou of John Hancock

11:15 a.m. – registration
11:50 a.m. – lunch
12 noon – 1:30 p.m. – C.E. Program
Location: Atlantis Country Club
190 Atlantis Blvd, Atlantis, FL
www.atlantisdine.com

May 20, 2009

VTC on DVD True Confessions of an
Exit Strategy Advisor
1:00 p.m. to 3:15 p.m.
(2 hrs Insurance, CFP®, CLE, CPE
ICB & PACE)

Location: Capital Conclusions Corp
7000 West Palmetto Park Rd #402
Boca Raton, FL 33433
Harvey Stein, CLU, ChFC – HOST

May 21, 2009

Joint Annual Meeting & CE
Installation/Election of Officers
Luncheon Meeting / 1 hr. C.E. – LTC
11:15 a.m. – registration
11:50 a.m. – lunch
12 noon – 1:30 p.m. – C.E. Program
Location: Atlantis Country Club
190 Atlantis Blvd, Atlantis, FL
www.atlantisdine.com

Palm Beach County Chapter



William Stansbury, CLU, ChFC
President 2008-2009

Congratulations

2009 Society FSP – Membership Milestones
Recipients who joined us at the Chapter's March 25, 2009 meeting.



A. W. Bud Allen, CLU, ChFC
35 years of membership!



Eric Fischer, CLU, AEP
20 years



Harvey Stein, CLU, ChFC
20 years



Bill Clark, Jr.
1 yr



Donald Kolb
MBA, CFP®
1 yr



Andrew Shamp
JD, LLM
1 yr



Laz Mur
JD
1 yr

A special thank you to our panelists on March 25, 2009
How to Effectively Communicate with CPAs!



Ed Ricardo
CPA/ABV/CFF,CVA

Laz Mur
JD

Art Jordan
CPA

Harvey Stein
CLU, ChFC

Thursday – April 23, 2009

Luncheon Meeting with 1 hr C.E. @ Atlantis Country Club – Atlantis, FL

Palm Beach County Chapter Leaders

President

William E. Stansbury, CLU, ChFC
561-988-8984
bill@lifeinsuranceconcepts.com

President-Elect

Nancy Hite, CFP®, CLU, ChFC, RFC
561-997-8800
finadvv@comcast.net

Secretary-Treasurer

Harvey Stein, CLU, ChFC
561-392-7400
harveystein@bellsouth.net

Immediate Past-President

Darlene M. Hanes, CLU, ChFC
561-252-1061
dmhcluchfc@comcast.net

Directors

Teresa Di Lorenzo, ChFC, CEP, ATP
561-279-7630
dfs@df.fdn.com

Jeff Ritter, DBA, MBA, BBA
561-272-7800
jritter1961@bellsouth.net

Laz Mur, Esq
561-691-5427
lmur@nixonpeabody.com

Adi Toth, CFP®, MBA, CLU, ChFC
561-962-2923
adi.toth@nmfn.com

Andrew Shamp, JD, LL.M.
561-988-8974
ashamp@lifeinsuranceconcepts.com

Chapter Executive

Claire Gamelin
561-588-5444
admin@pbsfsp.org or
clairegamelin@comcast.net

Society of FSP – President

Rod Hansen, CFP®, CLU, ChFC, AEP
800-800-2599
roderick.hansen@pacificlife.com

*Members ♦ Allied Professionals ♦ Guests ♦ Non-Members
you are cordially invited to join us*

Successful Gifting Strategies That Make Sense in 2009

1 hr Insurance #65633, CFP and CPE credit

Presented by Rob Georgiou of John Hancock

Fueled by philanthropic wishes, the gifting marketplace is sizeable. It is also important to note that the baby boomers, who advisors are already speaking to about retirement planning, make up the largest givers. As advisors, this is a great opportunity to set yourselves apart by delivering multiple strategies to your clients. This course begins by discussing generation gifting and will cover such topics as gift and GST taxes and will give strategies to help clients accomplish their wealth transfer goals. Then the course shifts gears and discusses charitable gifting. Just like in the generational gifting section, basic information is provided and strategies to help your clients accomplish their charitable gifting goals are compared and contrasted.

MEETING SPONSORED BY:



Rob Georgiou
RGeorgiou@jhancock.com



Darlene M. Hanes, CLU, ChFC
561-252-1061
dmhcluchfc@comcast.net

Location: Atlantis Country Club
190 Atlantis Blvd
Atlantis, FL 33462

Directions: I-95/Lantana Rd WEST to
Congress Ave. Turn Right. At 2nd light
(JFK Drive) turn left. Proceed to Guard Gate. Take immediate right.
Country Club on right.

Web: <http://www.AtlantisDine.com>

Time: 11:15 A.M. – Registration
11:45 A.M. – Announcements & Lunch
12:25 P.M. – C.E. Presentation
1:15 P.M. – End of presentation

Cost of Lunch + Insurance, CFP® & CPE

\$25 / FSP member – any chapter
\$25 / Guest of FSP member
\$30 / Allied org member – NAIFA-PB, HUA
\$50 / non-member

RSVP no later than April 20, 2009 - Register on line:

<http://www.pbsfsp.org>

If you no longer wish to receive emails or faxes by Chapter, contact admin@pbsfsp.org or 561-588-5444

NEW!

Membership Networking Information

Future editions will list Professional Interest Sections Member Specialties

We welcome comments admin@pbsfsp.org

Welcome New Members!

Erik Brown, CLU

Atlantic Benefit Group

Sponsor: Darlene M. Hanes, CLU, ChFC

Ed Ricardo, CPA/ABV/CFF,CVA

Jordan Castellon Ricardo, PL

Sponsor: Laz Mur, JD

Thank you for renewing!

Meralie Dupuis ChFC, CLU

HELP FSP GROW AND BE A WINNER!

Individual Member Competition

Individual Member Prizes: Every member that recruits just one new member is a **guaranteed winner!** The more you recruit the greater the value of your prize (see schedule below).

Grand Prize: The member that recruits the most new members will receive a free 2009 FSP Forum and Professional Leadership Symposium (including 3 nights onsite hotel lodging, airfare voucher of \$500, PLUS complimentary national dues for the 2009-10 membership year. In the event of a tie, winner will be selected by drawing.

- Recruit 5 or more new members and your 2009-10 National Dues are complimentary.
- Recruit 2 to 4 new members and receive 50% off your 2009-10 National Dues.
- Recruit 1 new member and receive 25% off your 2009-10 National Dues.

Visit <http://www.financialpro.org> for more details!

Palm Beach County Chapter Members Attorneys in Varied Professional Sections

Estate Planning

Boyles, Kevan JD
Law Office of Kevan Boyles, P.A.
(561) 833-2472

Engelhardt, Jo Ann JD
Bessemer Trust
(561) 655-4030

Kahn, Corrinne JD, CLU, ChFC
RM Lawyer (Rutherford Mulhall, P.A.)
(945) 424-4601

Newman, Steve JD
Nixon Peabody, LP
(561) 691-5424

Shamp, Andrew JD, LLM
Life Insurance Concepts
(561) 988-8984

Turk, Evan JD
Turk and Associates
(561) 860-1845

Electronic Sections Package

Kratish, Traci JD LLM CPA
Life Insurance Concepts/Cambridge
Financing Company
(561) 988-8984

Financial Planning

McTague, Joel MBA, JD, RFC, ChFC, MFP
Frank, Weinberg, Black, LP
(954) 474-8000

Retirement Counseling

Lazaro Mur, JD
Nixon Peabody, LP
(561) 691-5427