



***The 2010 LTA Masters Academy is just days away. To get you prepared for the meeting, we have listed below some information that may be helpful to you.***

### **Hotel Information**

*Crowne Plaza, Chicago O'Hare*

5440 North River Road  
Rosemont, IL 60018  
847-671-6350

### **Shuttle Transportation**

#### **Directions to Hotel Shuttle from O'HARE Airport**

**Follow directions to Baggage Claim Area (lower level).**

1. From baggage claim please follow the signs that will lead you to the **Bus Shuttle Center** which is located one level below baggage claim.  
\*\*There are red arrows directing you on both the signage and red arrows marked on the floor at O'Hare.
2. Once you have taken the elevator and reached the Bus Shuttle Center please proceed to **Door 2**.
3. Wait for the Crowne Plaza O'Hare shuttle bus that is burgundy colored. Please make certain that guests get on the Shuttle that says "**Crowne Plaza Chicago O'Hare**".

#### **For arrivals into MIDWAY Airport**

Omega Airport Shuttle is convenient and inexpensive (Approx. \$16.00) for traveling between Midway and O'Hare International Airports. Shuttles leave Chicago Midway Airport every hour between 7:00 am and 10:00 pm and travel to O'Hare International Airport. Travelers are picked up at door **M1 at Chicago Midway Airport**.

<http://www.omegashuttle.com>

### **Hotel Shuttle**

Once you are at O'Hare Airport, guests can take the Crowne Plaza O'Hare shuttle directly to the hotel. The shuttle runs every 30 minutes on hour and half hour.

### **Transportation**

Driving directions for those that are driving or renting a car.

**From O'Hare Airport.** Head East on I-190, for 2 miles to River Road. Turn right on River Road and proceed down to 5440 N. River Road, directly across from the convention center.

**From the East (Chicago).** Take I90 West to 190 (O'Hare exit) continue 15 miles to River Road exit. Turn right on River Road and proceed to 5440 N. River Road directly across from the convention center.

**From the West (Rockford).** Take I90 East to Chicago. Exit on Cumberland Road North. Go right on Cumberland, 2 blocks to 1st light (Higgins/Rt.72). Go left on Higgins and proceed 1 mile to River Road. Go left on River Road and proceed to 5440 N. River Road directly across from the Convention Center.

**From the South (Indiana).** Take 294 North (Wisconsin) and follow signs to 190 (O'Hare exit). Take 190 to River Road (1st light). Go right on River Road and proceed to 5440 N. River Road directly across from the Convention Center.

**From the North (Wisconsin).** Take 294 South to 190 East, follow signs to O'Hare. Pay at toll. Stay in the right lane. Exit Mannheim Road South. Get back on the highway and follow signs to Chicago. Exit River Road South. Turn Right. Hotel is on the right side, approximately 2 blocks down

### **Parking**

The hotel offers self/on-site parking. All parking is on a first come first serve basis. The discounted parking rate for our group is \$8.00 per day, per car.

### **Attire**

The dress for all events is business casual. Temperatures in Chicago this week are 70's for daytime highs and 50/60's in the evenings.

### **Check in/Check- out time**

Check in time is 3:00 pm and check out time is 12:00 noon.

### **Wireless Internet**

Complimentary wireless internet will be available in every guest room.

### **Wednesday Evening Cocktail Reception**

Please join us from 7:00 – 9:00 pm on Wednesday evening in the Metro Place room at the Crowne Plaza Hotel. Cocktails and light Hors D'oeuvres will be available.

### **Agenda**

A full agenda is attached.

### **Thursday Evening Dine-a-round**

Several of our sponsoring companies will be taking groups of attendees out to dinner after the reception on Thursday evening. All restaurants are within walking distance of the hotel. We have pre-assigned you to a group so if you are unable to attend, please let Laurie or Ashley know when you check in on Thursday morning.

***We look forward to seeing everyone in Chicago. We have a very full agenda planned with informative and industry leading speakers, opportunities to network with sponsors and other attendees and some fun as well. Safe travels.***

The logo for LTA Masters Academy 2010. It features a stylized black silhouette of a trophy cup on the left. To the right of the trophy, the text "LTA" is written in a large, bold, black sans-serif font. Below "LTA", the words "Masters Academy" are written in a smaller, black sans-serif font, and "2010" is written in the same font size as "LTA". A blue curved line arches over the trophy and the text.

**SEPTEMBER 23-24, 2010 CHICAGO, IL  
CROWNE PLAZA O'HARE**



## Wednesday, September 22, 2010

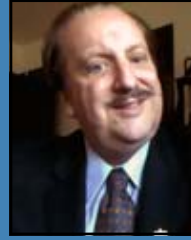
- 8:00 am - 5:00 pm **Management Committee Meeting** Orly Room  
Shareholders Only
- 7:00 pm - 9:00 pm **Cocktail Reception** Metro Place Room  
Cocktails and light Hors D'oeuvres

## Thursday, September 23, 2010

All General Sessions are in **O'Hare V**  
Exhibitor Booths & ROUNDTABLES are in **O'Hare IV**

- 8:00 am - 8:10 am **Welcome**
- 8:10 am - 9:00 am **State of the Economy**  
A broad view of the big areas that do and will influence the financial services marketplace and particularly the life insurance and retirement segments. Mr. Skorburg will share his views on what he sees as the key national and international financial, economic, societal, legislative and regulatory factors
- 9:00 am - 9:50 am **State of the Industry**  
Ron J. Grensteiner, President of American Equity will discuss the industry in light of economic conditions, current regulatory changes and how carriers must respond
- 9:50 am - 10:10 am **Break - Visit Booths**
- 10:10 am - 10:15 am **\$50 Bill Dill Giveaway**
- 10:15 am - 10:40 am **State of the Life Market**  
Garth Garlock, Senior Vice President of North American Company for Life and Health
- 10:40 am - 11:20 am **State of the Annuity Market**  
John Welsh, CFP, ChFC Accumulation Products External Wholesaler of Reliance Standard
- 11:20 am - 11:30 am **Great American**  
Sean O'Connell, Sales Manager of Great American
- 11:30 am - 12:00 pm **Compliance & Regulatory Update**  
Maureen Closson, Esq., Senior Vice President of Compliance for Aviva USA
- 12:00 pm - 12:55 pm **Lunch in Exhibit Hall**
- 12:55 pm - 1:00 pm **\$50 Bill Giveaway**
- 1:00 pm - 1:45 pm **Astonish Results**  
**Serving the Modern Consumer: Utilizing Internet Marketing to find, sell, and keep more customers profitably.** Failure to grasp Internet marketing is a death wish for insurance agencies. Astonish Results President, Tim Sawyer, discusses how to create a web presence and strategy that drives leads to your website, while maximizing existing customer relationships. With a growing number of insurance media recognizing the success of their clients, the buzz around this company and its services is undeniable. This session will also address realities and misconceptions of Internet marketing
- 1:45 pm - 2:25 pm **Lincoln Financial Group and Pilot Financial Advisors**  
Kevin Jones, Regional Sales Director of Fixed Annuity, Lincoln Financial Group  
Anthony Harlan, Sales Vice President of ABGA Division, Lincoln Financial Group  
Al Capps, Pilot Financial Advisors and Roger Siegler, Pilot Financial Advisors

# SPEAKERS



## The Economy

**John W. Skorburg**  
*Economist & Policy Advisor*  
Heartland Institute

Mr. Skorburg is a lecturer in Economics and Finance at the University of Illinois at Chicago and Associate Editor of Budget & Tax News. He is also a Policy Advisor for the Heartland Institute. He will share a high broad view of the big areas that do and will influence the financial services marketplace and particularly the life insurance and retirement segments.



## The Industry

**Ron J. Grensteiner**  
*President*  
American Equity Life

Our keynote industry speaker will present his view on the national and international financial, economic, societal, legislative and regulatory factors that will shape where the insurance and retirement planning industry will be in the near future and beyond. He will be accompanied by James M. Gerlach, Executive Vice President of American Equity.



## State of Life

**Garth Garlock**  
*Senior Vice President & CMO*  
North American Company for Life and Health

As Senior Vice President and Chief Marketing Officer, Mr. Garlock leads North American's distribution outlets, four sales regions, and sales vice presidents.



## State of Annuity

**John Welsh, CFP, ChFC**  
*Accumulation Products External Wholesaler*  
Reliance Standard Life Insurance Company

John Welsh is responsible for establishing and growing partnerships with Independent Marketing Organizations (IMO) throughout the Northwestern and North Central United States.



## Compliance

**Maureen H. Closson, Esq.**  
*Senior Vice President of Compliance*  
Aviva USA

Maureen Closson is Senior Vice President of Compliance for Aviva USA and is responsible for all insurance compliance for the US business, including regulatory affairs.

## Thursday, September 23, 2010

- 2:25 pm - 2:35 pm **Assurity**  
Kylie Ensrud, Regional Sales Manager
- 2:35 pm - 2:55 pm **American Equity**  
Wade Eldrige, Regional Marketing Director
- 2:55 pm - 3:25 pm **Break - Visit Booths**
- 3:25 pm - 3:30 pm **\$50 Bill Dill Giveaway**
- 3:30 pm - 3:50 pm **Aviva Life and Annuity**  
Tim Randall, Sales Development Specialist from Aviva Life and Annuity
- 3:50 pm - 4:10 pm **North American Company for Life and Health**  
Garth Garlock, Senior Vice President & CMO and Gayle Allen, Assistant Vice President of Annuity Sales
- 4:10 pm - 4:30 pm **RBC Insurance**  
Caryl Christie, Director of Traditional Annuity Marketing and Hank Yarborough
- 4:30 pm - 4:50 pm **American General Life Companies**  
Kelly Steinmetz, Regional VP and Glenn Plotkin, Director of Marketing Services
- 4:50 pm - 5:00 pm **Short Break** (move to roundtables)
- 5:00 pm - 6:00 pm **ROUNDTABLES**
- 7:00 pm - 8:00 pm **Cocktail Reception** Love Field
- 8:00 pm **Dine-A-Round**

## Friday, September 24, 2010

- 7:50 am - 7:55 am **\$50 Bill Dill Giveaway**
- 7:55 am - 8:00 am **Introduction**
- 8:00 am - 9:15 am **Strategic Coach**  
Shannon Waller, 18-year veteran of Strategic Coach
- 9:15 am - 9:55 am **Atlantis Marketing Solutions Sales System**  
Mary Schneider, Lana Tapani, Steven Wise and Gregg McIntosh
- 9:55 am - 10:05 am **Short Break** (move to roundtables)
- 10:05 am - 12:05 pm **ROUNDTABLES**
- 12:05 am - 1:00 pm **Lunch in Exhibit Hall**
- 1:00 pm - 1:05 am **\$50 Bill Dill Giveaway**
- 1:05 pm - 1:45 pm **American General Life and Accident Sales System**  
Claudia Houston, Director New Career Communications & Field Relations for AGLA
- 1:45 pm - 2:00 pm **Underwriting for Issue**  
Bob Pedigo, Chief Underwriter for LTA Marketing Group, LLC
- 2:00 pm - 2:55 pm **LTA Sales Masters Panel**  
Leading production members, representing an array of markets and approaches, discuss how they are able to enjoy strong production in spite of tough industry conditions
- 3:00 pm **End of Meeting**

# SPEAKERS



**Strategic Coach**  
Shannon Waller  
*Strategic Coach*

Shannon Waller has been with Strategic Coach for more than 18 years and is very familiar with the insurance business from the many clients in the industry she has worked with in her time at Strategic Coach.



**Marketing**  
Tim Sawyer  
*President*  
**Astonish Results**

**President & Founder Astonish Results**  
From 1991 to 2006 Tim worked as a top producing mortgage originator for a large federal savings bank and President of a marketing, training, and consulting business for banks and credit unions. In 2006, Tim, along with marketing guru Adam DeGraide started Astonish Results. He has trained and consulted hundreds of insurance professionals in every aspect of the business with a focus on leadership, digital marketing, and best sales practices.

## Underwriting

**Bob Pedigo** is the Chief Underwriter for LTA. Previously he was the Vice President and Chief Underwriter at Indianapolis Life. He has 34 years of underwriting experience and sold insurance early in his career. He has a BS in Business Management from Indiana University and holds the CLU, FALU, and FLMI designations and is certified to read electrocardiograms. Bob works closely with LTA producers in navigating their cases through the underwriting process and is their advocate in working with home office underwriters.

## LTA Sales Masters Panel

**Moderated by**  
Jack Aiken, President of LTA Marketing Group

Leading production members, representing an array of markets and approaches, discuss how they are able to enjoy strong production in spite of tough industry conditions.

**Eric Fortney**, US Marketing Corporation  
**Bob Pedigo**, LTA Marketing Group, LLC  
**Pat Raitt**, Premier Life and Annuities, LLC  
**Curt Smith**, Insurance Designers of New England

## MEETING ROOMS

General Sessions - O'Hare V  
Exhibitor Booths - O'Hare IV  
ROUNDTABLES - O'Hare IV

## DINE-A-ROUND

Several of our sponsoring companies will be taking groups of attendees out to dinner after the reception on Thursday evening

# THANK YOU TO OUR SPONSORS!

## PLATINUM

### RELIANCE STANDARD

## GOLD



**AVIVA**



**American General**  
Life Companies



**RBC Insurance®**

## SILVER



Foresters Equity Services, Inc.  
A Wholly-Owned Subsidiary of Foresters



**MUTUAL TRUST**  
FINANCIAL GROUP<sup>SINCE 1904</sup>

## EXHIBITORS



**NATIONAL WESTERN LIFE**  
INSURANCE COMPANY

**AGLA**

### Wednesday Evening Cocktail Reception

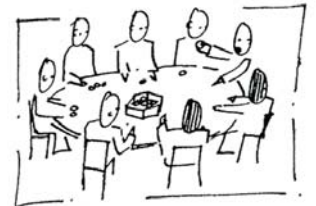
Please join us from 7:00 - 9:00 pm on Wednesday evening in the Metro Place room at the Crowne Plaza Hotel. Cocktails and light Hors D'oeuvres will be available.

### Roundtables

The small in-depth informal group discussions enable attendees to exchange views and information face to face with each participating carrier.

**Thursday, September 23** - 5:00 pm - 6:00 pm

**Friday, September 24** - 10:30 am - 12:30 pm



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Fargo, ND 58103  
701-232-5011 Phone  
701-232-5019 Fax  
866-232-5011 Toll Free  
www.ltamarketing.com



5440 North River Road  
Rosemont, Illinois 60018  
Hotel Direct: 847-671-6350



### \$50 Bill Dill

We will be giving away a total of FIVE \$50 Bills throughout the meeting! We will provide you with 5 tickets with your name on it. Be sure and drop your name into the box at the Giveaway Time and get a chance to win \$50.