The Toledo Council

Join us on Wednesday, November 2, 2011 for out Third Annual CE Symposium presented by FPA, TEPC, SFSP, and TAPPP. These professional organizations come together to bring you a day of Continuing Education programs, CE credits and networking with five great speakers and topics of interest to everyone. This year's speakers and presentations are as follows:

★Erin Thompson – SS Administration	*2011 Social Security Benefits & Medicare Update*
★David Hammack, CPA – Wm Vaughan Company	*2011 Tax Update*
★Thomas Grogan, Jr. – MetLife	*Income For Life*
★Thomas E. Rogerson – BNY Mellon Wealth Mgt	*Managing Family Wealth: Integrating into Financial Planning*
★J. Alan Lenahan/Gregory M. Dowling – Fund Evaluation Group	*Role of Alternative Investments in Asset Allocation Models*

Continuing Education request have been submitted for the following: CLE, OH Ins, MI Ins, CFP, & CPE. Be sure to bring the proper identification with you for your CE requests i.e. Ohio Insurance NPN number; Michigan System ID number. The day begins with continental breakfast, visits with our sponsors, three speakers, lunch, two speakers and closing – times as follows:

Bios for all of our speakers are on the on the back of this meeting notice.

	7:30 am	Check-in, Continental Breakfast, Sponsor Visitation, and Welcome
	8:15 am	Erin Thompson – Social Security Benefits & Medicare Update
	9:15 am	David Hammack – Tax Update
	10:15 am	Thomas Grogan – Income For Life
	11:15 pm	Sponsor Visitation, Attendees Message Retrieving and Office Communications
	11:30 pm	Lunch
	12:30 pm	Thomas E. Rogerson – Managing Family Wealth
	1:30 pm	Alan Lenahan/Greg Dowling – Role of Alternative Investments in Asset Allocation Models
	2:30 pm	Door prizes, thank you, closing
Date:		November 2, 2011
Time:		7:30 am – 2:30 pm
Location:		The Pinnacle, 1772 Indian Wood Circle, (Arrowhead Park), Maumee, OH 43537. (419-891-7325)
CE Credits:		One (1) CE credit for each presentation - five (5) if you attend all presentations
Cost:		$95.00 - Includes all meals, all speakers, all CE Credits

REGISTRATION: Payment must accompany registration. Checks or Credit Cards accepted - **Visa & MasterCard only.**

Name: ____

Company: ____

Phone: ______________________ Email: ____

PAYMENTS:

Checks: Make Checks Payable to: The Association Office

Mail Checks to: P. O. Box 140666, Toledo, OH 43614

Credit Cards: ***DO NOT EMAIL CREDIT CARD INFO** . . . Mail - or Fax to 1-800-718-3789*

We need these eight (8) pieces of information in order to process your card via phone or fax:

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5. CVV Number: (3-digit on back of card) ______________________
6. Billing Street Address/Zip Code: ____
7. **Authorized Amt. & Signature:** **$ ________________ ____**
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Our November 2, 2011 Presenters

Erin Thompson Erin Thompson, a native of Toledo, Ohio joined the Social Security Administration in 2001 upon graduation from the University of Toledo. She started her career as a Claims Representative specializing in Retirement, Survivors, Disability, and Health insurance. Erin was promoted in 2004 to Public Affairs Specialist and is the primary contact for media relations, outreach and presentations for the agency in the Toledo area. You can listen to Erin live monthly on "Social Security and You" a call in show that is featured on the first Tuesday of every month on WPOS 102.3 FM.

David Hammack David A. Hammack, CPA is a partner in the tax department at William Vaughan Company and he devotes a great deal of time working with manufacturing, distribution, construction, service, oil and gas, and collegiate coaching clients. His specific practice areas include entity and individual tax planning and consulting, business entity selection, corporate and non-corporate reorganizations, cost segregation studies, real estate transactions including tax-deferred exchanges, multi-state sales, use, income and excise taxation and nexus issues, retirement planning, stock options and non-traditional compensation planning and utilization, asset protections, and estate planning.

Linus Thomas Grogan Thom Grogan, Jr., CLU, ChFC, REBC entered the financial services industry in 1977 as Office Manager with John Hancock. He transitioned to sales and sales management in 1982, focusing on life insurance, mutual funds and annuities, qualifying for multiple leaders' conferences and a President's conference qualification. He joined MetLife in 1991 and spent 6-1/2 years as a financial services advisor working with educators in the secondary and post secondary markets, as well as not-for-profit employees in the health care industry in the Cleveland, Ohio market, specializing in 403(b) retirement plans.

Thomas E. Rogerson Thomas E. Rogerson is a Managing Director with BNY Mellon Wealth Management. He has more than 25 years of experience in the financial services industry. He has been invited to speak at numerous family meetings of some of the wealthiest families in the country. Tom is sought after as a commentator by many media outlets including The New York Time, MSNMoney.com, Worth Magazine and Men's Health. He is rated as one of the top speakers in the country.

Alan Lenahan J. Alan Lenahan, CFA, CAIA - Managing Principal/Director of Hedged Strategies with the Fund Evaluation Group, which he joined in 2001. He currently serves as co-director of FEG's hedged strategies. An investment professional since 1997, Alan holds a B.S.B.A. in Finance and Marketing from Xavier University. Prior to joining FEG, Alan worked as a Senior Corporate Finance and Risk Management Analyst at Western & Southern Life Insurance Company and was a Senior Associate of Valuation Services at Arthur Andersen. In addition to speaking at industry conferences, Alan was named one of the "20 Rising Stars of Hedge Funds" by Institutional Investor New in 2007.

Gregory Dowling Gregory M. Dowling, CFA, CAIA – Managing Principal/Director of Hedged Strategies. Greg joined FEG group in 2004. He developed FEG's operational due diligence for hedge funds and currently serves co-director of FEG's hedged strategies. An investment professional since 1997, Greg holds an M.B.A. in Business Administration from Xavier University and a B.S.B.A. in Business Administration from the University of Cincinnati. Prior to joining FEG Greg worked at Dowling Portfolio Management and Firstar Bank.

Questions?

Please contact Mary Ann Pontius at The Association Office

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