



**American Tax Planning Institute, LLC**

www.americantaxplanninginstitute.com  
2620 South Maryland Parkway, Suite 14-896  
Las Vegas, Nevada 89109  
Telephone: (800) 997-5282  
Facsimile: (818) 849-3463

**AGENDA**

**DAY 2: GENERAL SESSION**

- 8:00 AM - 8:05 AM Summit Kick-off - Kari Gillenwater**
- 8:05 AM - 8:35 AM From \$7 to Significance - Rao Garuda, ChFC, CLU, Co-Founder**  
*Listen as Rao shares his personal story of coming to America with only \$7 to his name, and how he achieved the American Dream for himself. Listen to Rao and become inspired to achieve your own dream in the process.*
- 8:35 AM - 9:05 AM Why are You Here? - Simon Singer, CFP, CAP, RFC, Co-Founder**  
*Master communicator and industry legend, Simon Singer will share his insights and communication skills with you.*
- 9:05 AM - 9:50 AM Digital Marketing for Your Business - Jeff Crandell**  
*Jeff will share how the American Tax Planning Institute will leverage the power of technology to attract and connect with affluent clients.*
- 9:50 AM - 10:05 AM Morning Break**
- 10:15 AM - 10:45 AM Wire Service Marketing - Ed Lyon, Tax Coach**  
*Tax expert Ed Lyon will share his top tax tips for you to use with your own clients!*
- 10:45 AM - 11:15 AM Members Panel - Rao Garuda & Simon Singer**  
*Hear from members about their experiences with the American Tax Planning Institute and how it may help your practice.*
- 11:15 AM - 11:30 AM ATPI Membership Details - Rao Garuda & Simon Singer**  
*Don't miss this session! Rao and Simon will provide the full details your membership in the American Tax Planning Institute.*
- 11:30 AM - 11:45 AM Thought Positioning for Today's Advisor - Clint Arthur, Status Factory**  
*Learn how to tap into positioning with today's media-focused customer base.*
- 11:45 AM - 12:45 PM Lunch & Networking**
- 12:55 PM - 1:25 PM Inside the Physician's Bag - Dr. Vicki Rackner, Targeting Doctors**  
*Determined to bridge the gap between physicians and advisors, Dr. Rackner coaches and consults advisors on how to tap into this lucrative, yet hard to reach market.*
- 1:25 PM - 1:55 PM InsMark Software Suite - Don Prehn, InsMark & Simon Singer**  
*Don will be sharing with us a powerful software suite used by Rao and Simon in nearly 100% of all their case designs.*

(over)

- 1:55 PM - 2:10 PM FIAs as a Bond Alternative - Jason Rindskopf, FIG**  
*Financial Independence Group will show you a valuable concept that is sure to increase your annuity production!*
- 2:10 PM - 2:30 PM You are the Expert: Get Quoted in the Media Today - Dan Janal, PR Leads**  
*Be sure people know about your expertise! Position yourself to generate trust and authority in today's skeptical marketplace.*
- 2:30 PM - 3:00 PM Quick Sales Ideas to Use Now! - Cathy Neifeld, J.D., AgencyOne**  
Set yourself up for success! Whether simple or complex, use these quick ideas to spark interest and increase sales!
- 3:00 PM - 3:15 PM Afternoon Break**
- 3:30 PM - 4:15 PM Why LTC Must be Factored into Your Clients' Retirement Planning - Barry Boscoe, CFP, Brighton Advisory Group**  
*Barry Boscoe, a 44-year veteran of the financial services field and famed lecturer, will enlighten you on how to open the minds of your clients with an asset-based long term care hedging strategy!*
- 4:15 PM - 5:00 PM Scott Keffer International - Scott Keffer**  
As the author of the #1 Amazon Best Seller 'Double Your Affluent Clients,' Scott is a master at showing advisors how to build a lifestyle-friendly practice that attracts a steady stream of Right-Fit clients. He explains how you can take home more income, enjoy more time off, and have a bigger impact on the things for which you care deeply.
- 5:00 PM - 5:15 PM Closing Thoughts - Rao Garuda & Simon Singer**



**American Tax Planning Institute, LLC**

www.americantaxplanninginstitute.com

2620 South Maryland Parkway, Suite 14-896

Las Vegas, Nevada 89109

Telephone: (800) 997-5282

Facsimile: (818) 849-3463

## **AGENDA**

### **DAY 3: GENERAL SESSION**

- 8:00 AM - 8:05 AM**    **Day 2 Kick-off - Kari Gillenwater**
- 8:05 AM - 8:45 AM**    **Old Products, New Uses - Simon Singer, CFP, CAP, RFC, Co-Founder**  
*Find money to better the client, while becoming rich yourself. Join Simon for a quick-paced explanation of a combination of strategies that will take you to the Top of the Table and the Forum 400.*
- 8:45 AM - 9:00 AM**    **Charitable Planning - Rao Garuda, ChFC, CLU, Co-Founder**  
*Dominate the affluent market by showing prospects how to convert their IRAs and qualified plans to Roth IRAs, while minimizing the tax impact of the conversion.*
- 9:00 AM - 9:30 AM**    **Charitable Planning Q&A - Rao Garuda & Randy Fox, EzCharitable**  
*Hear from two of the foremost experts on charitable planning, Rao Garuda and Randy Fox.*
- 9:30 AM - 9:45 AM**    **Mt. Everest - Evan Ohs, CLU, ChFC, Pacific Life**  
*Why climbing the world's tallest mountain is a lot more like retirement planning than you may think.*
- 9:45 AM - 10:00 AM**    **Morning Break**
- 10:15 AM - 11:00 AM**    **Why NOT to Name Your Revocable Trust as a Beneficiary of IRA - Shannon Evans, JD**  
*Join Shannon in a thoughtful discussion on why your clients' revocable trust should be excluded as a beneficiary to their IRAs.*
- 11:00 AM - 11:15 AM**    **Selling Technologies - Jerry Mainardi**  
*Jerry Mainardi will show you how utilize videos to educate your prospects and clients about the pitfalls of insufficient planning.*
- 11:15 AM - 11:35 AM**    **Membership Q&A - Rao Garuda & Simon Singer**  
*Here is your chance to ask the Founders questions about membership in the American Tax Planning Institute. Don't miss this opportunity!*
- 11:35 AM - 12:05 PM**    **Lunch & Networking**
- 1:30 PM - 2:10 PM**    **Advanced Defined Benefit Plans - Rao Garuda & Simon Singer**  
*Rao and Simon will discuss the "King of Qualified Plans" and "Split-Funded Defined Benefit Plans" (\$10M tax deductions and \$200k of premium). During this session, you will learn how to utilize advanced defined benefit plans to help the high-net-worth individuals create million-dollar tax deductions, while at the same time getting the money out of the plan with minimal taxation!*
- 2:10 PM - 2:20 PM**    **Closing Thoughts - Rao Garuda & Simon Singer**

**See you in Dallas, Texas – November 30<sup>th</sup> - December 2<sup>nd</sup>**