2016 Super CE Day
Thursday, April 28, 2016,
Hotel Fort Wayne
305 E Washington Center Road, Fort Wayne, IN 46825

	Speaker	**Topic**	**Course**	**Summary/Objective**
8:00 – 8:50	Marcy Buckner, VP, Government Affairs, NAHU	2016 National Legislative Update	30919	This course will contain an overview of the ACA implementation and up-to-date information; the legislative climate in Washington, "The Impact on Reform Potential Policy Changes, Overall Market changes; Employer Changes, Role of the Broker and Resources
9:00 – 11:50	Rebecca Gordon, VP, Gordon Marketing	Healthy Options for Americans	30863	This course will explore the different health options Americans have when it comes to health care. Some are conventional and others completely off the grid.
9:00 – 10:50	John Foxworthy II, CFP, Managing Director, Mahara Wealth Partners	Social Security Planning Strategies	30923	The Social Security rules have changed! As your clients near retirement, one of the biggest financial decisions they need to make is when to begin receiving Social Security retirement benefits. With pensions disappearing, Social Security remains the major source of guaranteed lifetime retirement income for most Americans. In this session, we will discuss the benefit calculation formula, survivor and spousal benefits (including divorced spouse benefits), spousal planning strategies, and how recent regulations have ended some of the more advanced claiming strategies.
9:00 – 9:50	Steve Hartnett, Executive Sales Director, ASR Health Benefits	Self-funding 101 to 401	**PENDING** 31087	Learn about the history, advantages and disadvantages of Self-Funding; Understand the types of stop loss and policy provisions; and things to consider when placing stop loss.
10:00 – 10:50	Jim Underwood AVP – TPA Services & Sales Administrator, Keven Linker, Director, Actuarial, & Analytical Services, Ava Lillmars, Manager, TPA, PHP	The Market for Level Funded Group Health Products	30925	The course will be structured to convey information around five concepts; (1) recent history; (2) what is level funding and how is it different from traditional self-funding; (3) what are the plusses and minuses; (4) what market forces are prompting interest; and (5) attributes of the target market.

11:00 – 11:50	Tony Wilson, Executive VP, Sales, One Resource Group	Utilizing Life Insurance in Retirement Planning	**PENDING** 31089	Life Insurance can be used in many different ways throughout the planning process. Join us as we discuss how to utilize life insurance in the retirement planning process and how it can help your clients create a tax-free income for retirement.
11:00 – 11:50	Eric Barker, Regional Director, TrueRx	How to Choose a PBM to Maximize Benefits	30973	This course will discuss PBM revenue resources and will define key areas of pharmacy benefit management. The course will discuss plan design in depth and how that can maximize savings in the pharmacy benefit. The discussion will end with additional insight to help agents recommend a PBM for clients.
12:30 – 12:45	Eric Doden, CEO, Greater Fort Wayne	City of Fort Wayne's new landscape – "The face of Fort Wayne is changing"	n/a	Hear what the City of Fort Wayne has in store for economic development and downtown growth. Fort Wayne was awarded a State grant in support of our city's vision.
1:00 – 3:50	Rebecca Vaughan, LTCP, Director IN LTC Partnership Program	Overview of the Indiana LTC Partnership Program	**PENDING**	The Indiana Long Term Care Partnership Program provides economic incentives to purchasers of private long term care policies. This presentation will explain the Partnership Program requirements and policyholder benefits.
1:00 – 1:50	Tracy Troyer, Attorney at Law, Troyer & Good PC	Medicaid & Long Term Care	30922	Discussion of the Medicaid law and its' impact on long term care; Case studies and strategies to help clients and their families
1:00 – 1:50	Della Kirkman, CPA, Owner, Kirkman CPA Group, Inc.	Individual ACA Implications	30924	Review of ACA insurance requirements, exemptions, penalties, subsidies, form 1095, new taxes and other changes.
2:00 – 2:50	John Foxworthy II, CFP, Managing Director, Mahara Wealth Partners	Advanced Estate Planning	30926	Advanced estate planning is often needed to ensure that your clients' wealth will be passed on in the most tax-efficient manner possible. In this session, we will discuss the changing landscape of the federal estate tax system, techniques to minimize estate taxes (including the different trust arrangements), and common estate freeze strategies. John will be joined by Damian Gosheff, a top estate planning attorney from local firm Faegre Baker Daniels.
2:00 – 2:50	Ruste Pontenberg, VP, The HSA Authority	HSA's Group: Employer versus Employee Responsibilities	**PENDING** 31000	This presentation will explore the benefits of this tax saving tool for both the employer and employee as well as the responsibilities associated to these type of accounts.
3:00 – 3:50	Roy Mikesh, Regional Sales Manager, IN Medicare Programs, Anthem	Turning age 65: Medicare Advantage vs. Medicare Supplement	27660	The primary goal is to ensure that all associates understand the concerns and struggles seniors have when trying to make a decision upon aging into Medicare. This course will also provide an understanding of the differences between a Medicare

				Advantage and a Medicare Supplement.
3:00 – 3:50	Kayla Hsu, MPH, CHES, HIP Link Outreach Coordinator, Kayla Hsu, Indiana Family and Social Services Administration	HIP 2.0 Employer Link	30920	This presentation will provide a comprehensive review of Indiana's new premium assistance program. Attendees will learn how HIP Link may benefit local businesses and organizations and how they can utilize the program to better serve clients and potential prospects.
4:20 – 5:10	Trenton Hahn, Sr. VP, Bose Public Affairs Group	2016 State Legislative Updates	30921	Overview of Short session; Updates on bills: 765, SB 148, HP 115 bill, SB100 - Civil Rights, HB 1001 & SB 333 - Road Funding, HB 1263 – Prescription and Telemedicine, HB 1136 - IDOI, SB 165 – HIP, and SB 30 – Denied Insurance Claims,