

Monday, March 10, 2025

Chopin Meeting Rooms 1-4

7:00 AM	BREAKFAST - Chopin Patio
8:00 AM	Opening Remarks and Sponsor Recognition Rohe Levy, President, Rohe Levy Financial
8:15 AM	Indexed Universal Life Insurance: Product Overview and Update Stephan Mitchell, Product Analysis, First Financial Resources
9:00 AM	The Art of Underwriting: Navigating the Evolution of Clinical v. Insurance Medical Classifications Tiffany Hyde, SVP, Head of Underwriting, Lion Street
9:50 AM	BREAK
10:10 AM	Estate Planning Strategies for 2025 and Beyond Patrick Conner, Partner, Chair of the Private Wealth Group, Husch Blackwell LLP
11:00 AM	Cutting Edge Life Insurance Designs and Analytics for 2025 Estate Planning Michael Fontanini, Vice President, Advanced Sales and Design, Lion Street
11:45 AM	Current Lending Environment With Wintrust Patrice Louis, Executive Vice President, Wintrust Life Finance
12:15 PM	LUNCH - Chopin Patio
1:15 PM	Indexed Universal Life (IUL) Insurance Best Practices Lewis Tran, Sr. Project Specialist, Pacific Life
1:45 PM	Unlocking the Power of AI: A Guide For Financial Professionals Nicholas Bowman, Co-Founder, Xcela AI
2:15 PM	Fintech Ecosystem Rohe Levy, President, Rohe Levy Financial Gabriella Levy, VP New Business & Case Management, Rohe Levy Financial
2:30 PM	Why You Need to Look At Inforce Policies Rohe Levy, President, Rohe Levy Financial Stephan Mitchell, Product Analysis, First Financial Resources
3:00 PM	Premium Finance Design Den & Case Studies Rohe Levy, President, Rohe Levy Financial
3:30 PM	MEETING ADJOURNS - Open Night



Tuesday, March 11, 2025

Chopin Meeting Rooms 1-4

7:00 AM	BREAKFAST - Chopin Patio
8:00 AM	Day 1 Recap Rohe Levy, President, Rohe Levy Financial
8:10 AM	Life Settlements and Life Insurance Valuation Solutions Jamie Mendelsohn, Executive Vice President, Ashar Group
8:50 AM	Unlocking Opportunities: Foreign National & Private Placement Underwriting Tiffany Hyde, SVP, Head of Underwriting, Lion Street
9:40 AM	Business Succession, Tax, and PPLI Patrick Conner, Partner, Chair of the Private Wealth Group, Husch Blackwell LLP
10:30 AM	BREAK
10:45 AM	Generating Structural Alpha Using PPLI & PPVA Dave Reynolds, Chief Marketing Officer, Spearhead Administrative Services Michael Ashley Schulman, Chief Investment Officer
11:15 AM	PPLI Lending & Foreign National Lending Patrice Louis, Executive Vice President, Wintrust Life Finance Rohe Levy, President, Rohe Levy Financial
11:30 AM	Into the Great Wide Open: SMA Programs for PPLI & PPVA Dave Reynolds, Chief Marketing Officer, Spearhead Administrative Services
12:00 PM	LUNCH - Chopin Patio
1:00 PM	IDF Panel Moderator: Anthony Stanek, Managing Director, Investors Preferred Fran Golden, Managing Director, Blackstone John Gardner, CEO, Finch Investment Group Josh Chmara, Senior Vice President, Neuberger Berman Private Debt
1:45 PM	SMA Panel Moderator: Dave Reynolds, Chief Marketing Officer, Spearhead Administrative Services Michael Ashley Schulman, Chief Investment Officer, Running Point Capital Samita "Sam" Malik, Chief Insurance Officer, Arta Finance
2:30 PM	PPLI/PPVA Design Den & Case Studies Anthony Stanek, Managing Director, Investors Preferred Rohe Levy, President, Rohe Levy Financial
3:30 PM	CONFERENCE ADJOURNS

