30th Annual Ozarks Iday 2009

A Day of Growth for Insurance and Financial Service Professionals

Friday, October 9, 2009
(8:00am-4:00pm)

Ramada Oasis Convention Center
2546 North Glenstone,
Springfield, MO

- **Networking with Industry Colleagues**
- **CE Credits**
- **Professional Panel**
- **Concurrent Sessions on the Latest Issues**
- **Luncheon**

Featured Speaker

John Borbi – The Dark Side of Success

In 1995, John began his journey as a financial advisor at a full financial services firm. He quickly gained a clientele and continued his rise as an investment expert within the company. This led to becoming the firm's Investment Specialist and managing 140 investment advisors. John continued to grow his personal client list and would eventually manage close to $100 million in assets for his own clients and rank in the top 1% for financial advisors.

John's income grew from $28,000 in his first year to $500,000 seven years later; this dramatic rise of income would prove to be his downfall and lead to some poor ethical choices. Within a 7-month period, John transferred close to $500,000 and was caught when his biggest client noticed the illegal transfers. This crime lead to a 30 month sentence in Federal prison which John served from 2004 – 2006 in West Virginia.

John is now sharing his mistakes with others, with the intent to help those hearing his story to make strong ethical choices. Today's headlines make his message timely and highly sought after for keynote addresses and lively breakout sessions. John continues to speak to a diverse group including universities, corporations, and national and international associations. Because of his life experiences, John is uniquely qualified to share techniques on dealing with moral and ethical dilemmas to help others avoid unethical choices and criminal activity.

John is an active golfer and enjoys spending his time with his son and daughter. John's home is located in a suburb of Detroit, Michigan.

First 150 Full Registrants Get a FREE Continuing Education Card that is good for up to 10 HOURS CE Credit!

AGENDA

8:00-8:45 a.m. **Registration – Convention Center**

Continental Breakfast

9:00-9:50 a.m. **General Session- Two Options**

Professional Panel- General Public

Patrick Platter, Moderator
John Huff, Missouri Dept. of Insurance
Michael Colona, Missouri State Representative
Bob Dixon, Missouri State Representative
Larry Case, MAIA

Young Professionals and Students

Dr. *Stan Adamson, MSU, Moderator*
Aaron Tanner, Northwestern Mutual
Chad Page, Mutual of Omaha
Russell Winterberg, ANPAC

10:00-11:50 a.m. **Workshop Session 1**

A. **Hometown Ready- Your Community- Disaster Prepared** (10-11:50 am)

B1. **General Insurance Discussion** (10-10:50 am)
B2. **Settlement Demand & Settlement Issues** (11-11:50 am)

C1. **Marketing to Generation Y** (10-10:50 am)
C2. **Marine Insurance Risk Evaluation** (11-11:50am)

12:00-1:30 p.m. **Luncheon Buffet- Atrium**

Featured Speaker, *John Borbi*

1:30-1:50 p.m. **Networking**

In the Vendor Area

1:45- Drawing for Prizes & **GRAND PRIZE**

2:00-3:50 p.m. **Workshop Session 2**

A1. **Dark Side of Success** (2-2:50 pm)
A2. **Errors and Omissions Claims Awareness** (3-3:50 pm)

B1. **Life Insurance Needs** (2-2:50 pm)
B2. **Survive and Thrive Your First Three Years** (3-3:50pm)

Professional Panel 9:00 to 9:50 a.m.

Patrick Platter, Moderator

Patrick J. Platter is an attorney with the Law Firm of Neale & Newman, L.L.P. in Springfield, Missouri. His focus is on work related injury litigation, administrative law, and general trial practice. He is the author of the 'History, Administration and Jurisdiction of the Worker's Compensation Law' for the Missouri Bar desk book series.

John M. Huff, Director, MO Dept. of Insurance, Financial Institutions/Professional Registration

Appointed by Governor Jay Nixon, on February 6, 2009, John M. Huff brings to the position of Director 16 years of leadership experience in the insurance industry and dispute resolution. For the past 10 years, he has worked in positions of increasing responsibility with global leaders in the insurance industry. Previous to his current position, Mr. Huff has worked for Swiss Re as Managing Director and Strategic Claims Officer, GE Insurance Solutions, GE Frankona's, and Field, Gentry & Benjamin, P.C, (insurance practice in Kansas City, MO).

Michael J. Colona, Missouri State Representative 67th District

In addition to his legislative duties, Representative Colona is an attorney and has served as an adjunct professor of criminal justice for the University of Missouri – St Louis. Representative Colona serves on the Insurance Policy Committee.

Bob Dixon, Missouri State Representative, 140th District

Rep. Dixon serves as a member of the National Conference of State Legislatures Standing Committee on Economic Development, Trade and Cultural Affairs and the American Legislative Exchange Council's Criminal Justice Task Force. His legislative efforts and accomplishments have centered on crime prevention and public safety, the protection of children from predators and abusers, crime victims rights, the advancement of mental health, access to quality and affordable healthcare coupled with insurance reform, and increased funding for quality public education.

Larry Case, Executive Vice President, Missouri Association of Insurance Agents (MAIA)

Larry Case has been Executive VP for MAIA (largest insurance agents' association in MO) since 1999. Before joining MAIA in 1992, Case was executive VP of the MO Association of Professional Insurance Agent. He also worked in the insurance industry as a commercial lines marketing representative for seven years, and spent eight years in state government, with the Missouri Department of Agriculture and Department of Economic Development.

Young Professionals Panel

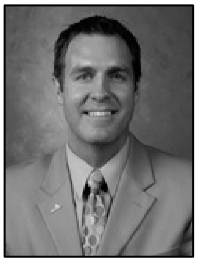
Aaron Tanner

Financial Representative for Northwestern Mutual Financial Network. He obtained his BS Degree from Missouri State University, with a Major in CIS and a Minor in Finance/ Economics.

Russell Winterberg

Senior Human Resource Representative at ANPAC. He obtained his BS in Marketing from Missouri State University and an HR Certificate through Missouri State MDI. He is working on his MA in HR Management at Webster University.

Chad Page



Recruiting Manager and Training Recruiting Manager at Mutual of Omaha. He obtained his Series 6, 63 and 26 licenses and attended Drury University.

MORNING WORKSHOP SESSION 10:00 – 11:50 am

A. Hometown Ready- Your Community- Disaster Prepared

Presented by: *John Elmore*

Are you Prepared for the Next Disaster? This Hometown Ready Program is intended to educate the community and encourage citizens and organizations to become actively involved in community disaster preparedness and survival. This session will also provide an explanation of the Community Emergency Response Team (CERT) Program which educates people about disaster preparedness.

B1. General Insurance Discussion- Q & A (10:00 am – 10:50 am)

Presented by: *John Huff, Director of Missouri Dept of Insurance*

This course will provide an opportunity to further learn about pressing insurance issues within the Missouri Department of Insurance. This class is meant to be a continuation of the Legislative Panel where people will have an opportunity to ask questions to John Huff that might not have been addressed during the panel.

B2. Settlement Demands & Settlement Issues (11:00 am – 11:50 am)

Presented by: *Laurel Stevenson* 1 Hour General CE

This course will emphasize issues of fraud and misrepresentation by claimants, medical providers, attorneys, and insureds, and how such issues impact an adjuster's obligation to act in good faith when considering demands and settlement issues. The course will also discuss recent case law developments in the area of fraud and settlement demands.

C1. Marketing to Generation Y (10:00 am – 10:50 am)

Presented by: *Dr. Alan Schaefer*

This course is designed to assist agents and insurance professionals to understand and improve their marketing to Generation Y. The skills to be gained from this class will help an agency improve their marketing focus for this generation, and to help spark business ideas in how to reach this demographic of the market.

C2. Marine Insurance Risk Evaluation (11:00 am – 11:50 am)

Presented by: *Michael Hunter* 1 Hour General CE (Pending)

Insurance professionals are often the first to discuss with a perspective client the need for a Marine Survey. They are also the first to have to explain the cost involved and reasons. But do they really understand the details which go into a proper Marine Survey. Is the vessel free of hazards? Will she blow up? Will she sink? Can someone die, be seriously hurt or is it just a financial loss? A proper marine survey serves to inform the owner and insurer the actual condition of the vessel for the safety of all. This introduction will provide the attendee with a cursory knowledge of the "how and why" of marine surveys and why they are different from any type of policy you will underwrite. It will better enable you to speak intelligibly to your client on this issue.

AFTERNOON WORKSHOP SESSION 2:00 – 3:50 pm

A1. Dark Side of Success (2:00 pm – 2:50 pm)

Presented by: *John Borbi*

A follow-up to John's real life story about pride, ego, greed, and materialism and how each consumed John to the point of destroying his life. Discover how John's life went through two extremes as he quickly became a top financial advisor, managing close to $100 million dollars for his clients and generating an income of $500,000, but then paid the ultimate price when he committed a federal crime and lost everything. John was sentenced to 30 months in prison and learned to live on 12 cents an hour.

A2. Errors and Omissions Claims Awareness (3:00 pm – 3:50 pm)

Presented by: *Konrad Hendrickson* 1 Hour General CE

This course is designed to provide claims awareness to agents. After taking this course, an agent will be able to identify the legal basis for agents' professional liability claims, exposures to and causes of loss, especially those unique to life products and property and casualty insurance products.

B1. Life Insurance Needs (2:00 pm – 2:50 pm)

Presented by: *Thomas L. Gardner* 1 Hour L/H CE (Pending)

This special program is based on a series of programs produced by NAIFA, designed to help you understand critical relationship between life insurance and client motivation. It will also refine your approach and help you learn how to translate numerical values into terms your client can easily understand. This program is covering the need for life insurance, life planning, and financial impact on premature death, life insurance in households, and an analysis of integrative life insurance needs.

B2. Survive and Thrive Your First Three Years (3:00 pm – 3:50 pm)

Presented by: *Aaron Tanner*

Whether you are a young advisor or an experienced individual new to the insurance and financial industry, you face the same challenges in developing your career. NAIFA's latest program offers insight and ideas that you can apply to your own game plan for success. In this session, you will learn strategies for building a successful practice: prospecting, lead generation, appointments, presentations, follow-up and referrals.

*NOTE: ALL PROGRAMS SUBJECT TO CHANGE

WORKSHOP LEADERS

John Elmore

John Elmore is a part of the Springfield-Greene County Office of Emergency Management. He is currently the Citizens Corp Program Manager for the Office of Emergency Management. He is involved with the CERT Program that educates members and organizations in the community on how to prepare for disasters.

Thomas L. Gardner

Thomas L. Gardner, CLU, ChFC, MSFS, is a U.S. Veteran and entered into the Insurance Industry in 1970. He began teaching LUTC courses in 1993. Today, a Trainer for New York Life, he teaches the NY Life Agents LUTC designation. Mr. Gardner is am AMTC (Agency Managers Training Council) Grad from GAMA International, and holds a Master of Science for Financial Services from the American College.

Konrad Hendrickson

Konrad Hendrickson is currently employed at ANPAC as Assistant Vice President, Associate General Counsel, and Commercial-Agribusiness Claims Officer. He holds a CPCU designation and is a licensed attorney in both Missouri and Illinois. Prior to attending UMKC law, he graduated from Missouri State with a degree in General Business as well as being one of the first graduates of the Insurance and Risk Management Program. Konrad has also served as adjunct faculty for Missouri State University from 2001 to 2006.

Michael Hunter

Michael Hunter is the owner of Hunter Consulting & Survey Services LLC. He is a Marine Accident Reconstructionist and an Accredited Marine Surveyor. His accreditations include SAMS-AMS, IAMI-CMI, ASNT-Level I Thermographer.

Dr. Allen Schaefer

Dr. Allen Schaefer is currently a Professor of Marketing in the College of Business at Missouri State University. He has been with Missouri State University since 1990. Previous to his employment with Missouri State, Dr. Schaefer worked as a Pharmaceutical Representative. He obtained his Ph.D. from Oklahoma State University and his MBA and BS from Kansas State University.

Laurel Stevenson

Partner with the law firm of Lathrop and Gage LC, Laurel is based in Springfield, MO and she practices throughout Missouri in the areas of products, premises, and trucking liability, personal injury, wrongful death, and UM/UIM. She is licensed in Missouri, Iowa and Wisconsin. She serves as counsel for a third-party administrator, providing liability and coverage opinions on cases in eight states. She is a graduate of the University of Missouri School of Law and conducts programs on proper claims handling, bad faith litigation and premises and trucking liability.

30th Annual Ozarks I-day 2009

Ozarks I-Day Committee
P. O. Box 4841
Springfield, MO 65808-4841

Your Name: ______________________________
Professional Designation(s) (or Student): ______________________________
Address: ______________________________
Employer/Company: ______________________________
E-mail Address (for confirmation): ______________________________
Business Phone Number: ______________________________
Professional Organization(s) of which you are a member: ______________________________
Please let us know if you have any special needs: ______________________________

For those attending classes for CE Credits, be sure to bring your NPR# with you.
(You can locate your NPR # at www.nipr.com/html/PacNpnSearch.html)

Circle the programs below you are most interested in attending.
Circle either a two-hour session or a combination of two one-hour sessions.

Ramada Oasis Inn

2546 N. Glenstone
Springfield, MO 65804
(417) 866-5253
Mention Group Name **I-Day**

$73.00 + tax
single/double

General Session **(9:00- 9:50am)**	***Workshop Session 1*** **(10:00-11:50am)**	***Workshop Session 2*** **(2:00-3:50pm)**
Professional Panel	A. Hometown Ready- Disaster Prepared	A1. Dark Side of Success (2-2:50pm)
Young Professionals Panel	B1. John Huff, MO Ins. Comm (10-10:50am)	A2. Errors & Omissions (3-3:50pm)
	B2. Settlement Demands/Issues (11-11:50am)	
	C1. Marketing to Generation Y (10-10:50am)	B1. Life Insurance Needs (2-2:50pm)
	C2. Marine Insurance Risk Eval (11-11:50am)	B2. Survive & Thrive (3-3:50pm)

WHAT DO YOU WANT TO HEAR?

* List the topic(s) or question(s) you would like the Professional Panel to cover:

1.
2.
3.

www.ozarksinsuranceday.com

Questions? Call (417) 887-4990, ext 2057 and ask for: *Rebecca Rast* or email: ozarksiday@gmail.com

Registration Fee for Full Day

Early registration, per person (postmarked prior to October 1st)	**$ 65**
Regular registration, per person (postmarked after October 1st)	**$ 75**
****NEW** Half-Day Registration (includes Lunch)**	**$ 45**
Lunch Only	**$ 35**

Make check payable to ***Ozarks I-Day*** ***Total Enclosed $*** _____

Mail check and registration form to:

Ozarks I-Day
P. O. Box 4841
Springfield, MO 65808-4841