Las Vegas Wealth Alliance Summit

February 25th and 26th, 2016

Sponsored by: Dunhill Insurance

Make 2016 a Quantum Leap Year:

- Achieve record-breaking life production in 2016 and beyond by leveraging your knowledge and connections in alliance with a proven team and their proprietary and patented resources
- **Create personal wealth by enhancing your client's wealth**
- Directly learn the strategies of the consultants who service ultra high net worth families/family offices in the US
- Cases are being written from $1 to $100 million in premium**… Learn *who is buying* them and *how to sell* them**

Moderators:

Paul Robb, CFP, ChFC, CLU
PH Robb Legacy Alliance

Lalat Pattanaik, MBA
PH Robb Legacy Alliance

Hugo Tomasio, JD
VP Specialty Markets AXA US

Agenda Topics:

Business Insurance

- Deductible deferred comp alternative
- Tax efficient succession plan strategy for pass-through entities
- Executive, Professional Athlete, and Entertainer strategies for tax efficient income

Estate Planning

- Creative wealth transfer strategies for the ultra-wealthy
- Multi-Gen plan creating tax favored benefits at 50:1 cost benefit ratio
- Life portfolio efficient design case studies from family office and TOLI consulting projects
- Patented LegacyTrax software demo: Life insurance as an asset class and zero estate tax alternatives

Alliance Business Model

- Rules of engagement
- Identifying target markets
- Creating a marketing plan for 2016 and beyond

Where & When:

Aria Hotel

3730 S Las Vegas Blvd., Las Vegas, NV 89158

February 25th and 26th, 2016

Dunhill will host lodging on Thursday, February 25th for qualified agents
Attendees are responsible for transportation to and from the event

Agenda:

Breakfast in meeting room: 8:30-9:15 am
Business Insurance: 9:15 am
Estate Planning: 10:45 am
Lunch in meeting room: 12:15 - 1:30 pm
LegacyTrax and Business Model: 1:30 pm
Meeting finished: 3:30 pm

To find out if you qualify, contact David Sprenger, Vice President, at (800) 659-1349 x 114 or davids@dunhillinsurance.com

Paul Robb, CFP, ChFC, CLU

PH Robb Legacy Alliance

Paul is a 30-year veteran of family, business and charitable planning. Starting his career with Northwestern Mutual in 1983, he thrived as a national joint work specialist for almost 20 years. A desire for a more open architecture business model led to engagements with Mass Mutual and AXA Equitable's open market platforms, continuing in the context of partnering on a consultative basis with other advisors nationally. During his extensive career, his concept of collaborative legacy planning evolved, culminating in the formation of PH Robb Legacy Alliance. As an industry innovator, Paul invented a virtual family office technology, resulting in a patent portfolio dealing with online collaboration in the financial services sector. Additionally, he created LegacyTrax, an interactive client driven software system focused specifically on legacy planning. This patented system is an exclusive and proprietary resource of PH Robb Legacy Alliance.

Paul earned his Bachelors in Finance and Accounting from the University of Arizona and holds a CFP (Certified Financial Planner) from the CFP Board, and the ChFC (Chartered Financial Consultant), and CLU (Chartered Life Underwriter) designations from The American College. Paul is a certified instructor in multiple states for tax, legal and financial services continuing education, and has been invited to make frequent presentations over the years to numerous industry groups.

Lalat Pattanaik, MBA

PH Robb Legacy Alliance

Lalat brings 25 years of technical experience in the areas of structured finance, product development, performance analytics, and sophisticated insurance structures. He has spent the last 20 years collaborating with financial, tax and legal advisors of ultra-high net worth (UHNW) families, their businesses, and family offices in order to critically evaluate, develop, and administer high impact insurance and estate planning solutions. Lalat is a co-founder of the Los Angeles based consulting firm of Apheta. The firm is recognized as an independent resource to the legal and CPA communities as well as a number of major banks and trust companies with regard to complex insurance matters. Apheta and its predecessor companies have developed unique proprietary platforms which assist UHNW business owners with the tax hurdles associated with tax diversification, business succession, and intergenerational wealth transfer. Lalat draws on his early career training with two visible global institutions—Goldman Sachs Asset Management and, subsequently, Northern Trust Company (Structured Equity Group / Private Client Group). These organizations provided a glimpse into the psychology as well as the multi-disciplinary expertise needed to address the planning needs of domestic and international UHNW families.

Lalat has a BA in Financial and International Economics, as well as an MBA in Finance, both from University of Michigan. Lalat has served on the product development boards of numerous global insurers, and has spoken widely at industry conferences including developing Continuing Education programs for tax attorneys and CPAs.

Hugo Tomasio, JD

VP Specialty Markets AXA US

Hugo Tomasio is a licensed attorney in NY and CT and has a decade of management experience in the life insurance industry at the carrier level in various departments, including Advanced Markets and most recently Specialty Markets, being responsible for the strategic planning and development of select life markets, designing and implementing business development initiatives that leverage in-depth knowledge of trends, risks, opportunities, and distribution partners. He manages complex, large face amount life insurance cases for HNW and UHNW clients addressing carrier guidelines and case packaging along with client requirements while also advising on the product design and proposed planning arrangements for sophisticated estate and business plans. Hugo specializes in the financial underwriting aspects of life insurance applications, including taxation, trusts, insurable interest issues, premium financing, and review of complex and unique insurance planning arrangements, provides technical updates, training, seminars, and CE to advisors nationwide.

Key professional associations include the American Bar Association, New York State Bar Association, Connecticut Bar Association, Society of Financial Service Professionals and the Estate Planning Council of Lower Fairfield County. He has authored articles in Trusts & Estates, AALU's Washington Report, and National Underwriter. He also delivers webinars and platform presentations to national audiences of advisors regularly, including the Society of Financial Service Professionals and numerous industry groups.

Hugo is a graduate of Villanova University where he studied finance, and University of Connecticut School of Law where he concentrated on taxation. He is fluent in Spanish.