

Insurance Seminar

December 12, 2017

OFDA Headquarters



Annuities (AM session)

7:00–7:30 AM Registration/Continental Breakfast

7:30 AM–12:00 PM

- Annuity Terminology
- Annuity phases
- Classification of annuities
- Types of annuities
- Annuity contract provisions
- The need for annuities
- Annuities as a financial planning tool
- Accessing cash value
- Income Tax Aspects of Annuities
- Annuity Suitability



12:00 PM Lunch provided for all attendees

Life and Disability Needs in Business (PM session)

12:00-12:30 PM
Registration

12:30 –5:00 PM

- Key Person Insurance
- Deferred Compensation
- Business Continuation
- Disability of a partner or owner/employee



Ohio Funeral
Directors Association
2501 North Star Rd.
Columbus, OH 43221

Continuing Education Credits for Insurance

Please complete the registration form and return it to the OFDA office, or register online at ofdaonline.org

Seating is limited to 50 participants. Payment-in-full must accompany registration form.

Seminar cancellations must be received by **7:30 AM, December 10, 2017** to receive a full refund.



Register at
ofdaonline.org

About our presenter



Rick Goosby

Rick Goosby entered the insurance business in 1973 as a producer with his family-owned insurance agency in Milford, Ohio (near Cincinnati). During his tenure with the agency, Rick served as a producer working in property, casualty, and life insurance sales, as Sales Manager responsible for building and growing a team of insurance producers, and as Corporate President. In 2004, he and his family sold the agency.

Rick's training career started in 1984 when he volunteered to teach insurance licensing classes in Ohio, and graduated to teaching various continuing education courses for insurance agents in Ohio and surrounding states. Rick began speaking for the Society of Certified Insurance Counselors in 1991, achieving National Faculty status in 1994. In addition to his National Faculty status, he also now serves as Educational Consultant for CIC programs in the State of Ohio, and Seminar Consultant for the Society's Ruble Graduate Seminars in Michigan. In addition to his work in CIC, Rick teaches CISR (Certified Insurance Service Representative) classes and other continuing education programs, and provides customized training programs for insurance agencies and companies throughout the United States.

Receive five insurance CEC's for EACH session. (pending approval)



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Registration

AM PM BOTH

Registrant #1 ☐ ☐ ☐

Registrant #2 ☐ ☐ ☐

Registrant #3 ☐ ☐ ☐

Funeral Home

City, State, Zip

E-mail address

National Producer Number #1

National Producer Number #2

National Producer Number #3

\$130 (\$260 Non Member) both sessions
\$70 (\$140 Non Member) AM or PM session

Make Checks payable to OFDA or provide credit card information below:

Total amount enclosed

Cardholder's Name

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