

Ohio Funeral Directors Association Insurance Seminar

December 11 • OFDA Office



The Realities and Rewards of Retirement Planning

(AM Session 7:30 am to Noon)

This course will review the tools, techniques, and challenges of planning and accumulating assets for a secure retirement, as well as the challenges and benefits in converting retirement assets into streams of income that the retiree will not outlive.

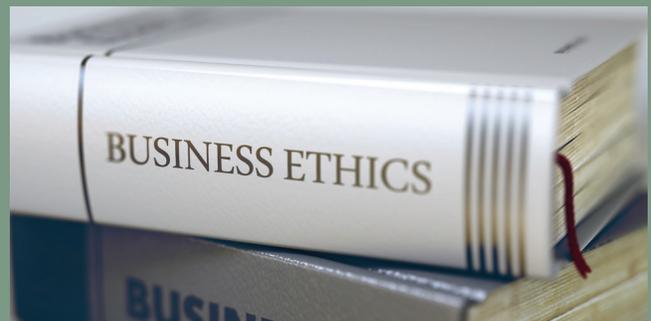
5 CE

Ethics: Dealing with the Fallout

(PM Session 12:30 to 5:00 pm)

This course will review the ethical responsibility, both legal and moral, in the transaction of insurance. It will also review the ethical duties an agent must understand.

5 CE (satisfies insurance ethics requirement)



ofdaonline.org

Diana@ofdaonline.org
800-589-6332

Registration on reverse



Presented by...

Rick Goolsby 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.



2501 North Star Road
 P. O. Box 21760
 Columbus, Ohio 43221
 Phone: 614-486-5339
 Fax: 614-486-5358
 Email:
 Diana@ofdaonline.org

Registration

Funeral Home Name			
Address			
City, State, Zip			
Phone		Funeral Home E-mail address	
Fees	\$75 (\$150 Non Member) AM or PM session		
	\$150 (\$300 Non Member) both sessions		
1. Registrant Name	<input type="checkbox"/> AM session only <input type="checkbox"/> PM session only <input type="checkbox"/> Both sessions	National producer #	Fee Amount
2. Registrant Name	<input type="checkbox"/> AM session only <input type="checkbox"/> PM session only <input type="checkbox"/> Both sessions	National producer #	
3. Registrant Name	<input type="checkbox"/> AM session only <input type="checkbox"/> PM session only <input type="checkbox"/> Both sessions	National producer #	
If paying by check, make payable to OFDA			Total Due
Name on Credit Card		E-mail for credit card receipt	
Billing Address			
Card #	   	Exp. Date	Security Code
Signature			

Registration also available at ofdaonline.org

Send this completed form to OFDA, 2501 North Star Road, P. O. Box 21760, Columbus, OH 43221, or fax to 614-486-5358