



General Meeting

Friday, May 19, 2017

8:30 - 10:00 am

Stockton Golf & Country Club

3800 W. Country Club Blvd • Stockton, CA 95204

*Meeting Sponsored by:
DI & LTC Ins Svcs
and Franklin Templeton*



Maxwell Schmitz, MSFS

GSI is Easier, Smarter, Stickier *What Financial Advisors Need to Know about Guarantee Standard Issue DI*

In 60 minutes, Maxwell Schmitz, MSFS, will walk us through the key points of Guarantee Standard Issue (GSI) DI, including:

- the key differences between Group LTD and GSI,
- when GSI makes the most sense,
- a profile of the ideal GSI case,
- and how it's issued,
- and the best proven ways to discuss this important type of coverage.

Maxwell Schmitz, VP of GSI Solutions at DI & LTC Insurance Services, joined the family agency full-time in 2009. He is a third-generation disability planning specialist and co-authored "The Questions and Answers on Disability Insurance Workbook." Max is the Past President of NAIFA Marin North Bay and has been a speaker at several industry and business events across California. He has his bachelor of arts from the University of California, Davis and a Master of Science in Financial Services through the American College. In his free time Max is a local history buff, an avid hiker, and a serial hobbyist.

Also at the meeting:
**2017/18 Board of
Directors Elections
& Installation**

Pre-paid Registration Required by Wednesday, May 17th

Register online at www.naifacentralvalley.org or fill out form below.

May 19th Meeting Registration

Cost: **\$23** (members) or **\$27** (non-members) – includes buffet breakfast

Method of Payment:

MC Visa Am Exp Check (payable to NAIFA Central Valley)

Name: _____

Credit Card #: _____

Company: _____

Exp Date: _____ CVV: _____ Billing Zip Code: _____

Address: _____

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Signature: _____

Return by May 17th to:

NAIFA Central Valley, 15 S. Rose St, Lodi, CA 95240

(209) 339-4651, Fax (209) 339-8273

kimmeretz@naifacentralvalley.org

No refunds. Registration is transferable.

Phone: _____

Email: _____