



General Meeting

Friday, February 20, 2015

8:30 - 10:00 am

Stockton Golf & Country Club

3800 W. Country Club Blvd • Stockton, CA 95204



Evan P. Ohs, CLU, ChFC

Estate Planning for the other 99.9%

The estate tax and estate planning environment today is very different from what it was just a few short years ago. The principal reason for this is the passage of the American Taxpayer Relief Act of 2012. The primary goal for this presentation is to provide you with some planning ideas and opportunities that may help your clients plan even though the majority of them no longer have a federal estate tax problem.

With over 17 years in the insurance and financial services business, Evan Ohs has been advising Top of the Table Producers, Financial Planners, and Investment Advisors on advanced sales ideas and strategies in the areas of wealth preservation and creative tax efficient accumulation plans. Evan also provides expertise in the areas of efficient client acquisition, technology productivity solutions and productive marketing initiatives.

As a Regional Vice President for Pacific Life, Evan partners with his team focusing on the distribution of Pacific Life's life insurance products in Northern California that comprise the San Francisco Regional Life Office. With over 14 years experience with Pacific Life, Evan has consistently been a top performer helping advisors generate millions of dollars of life insurance premium year after year.

As a member of SFSP, NAIFA and AALU, and a 10 year participant in the Strategic Coach program, Evan is a leader in the insurance and financial services community. He is a graduate of Cal Poly San Luis Obispo and resides in Walnut Creek with his wife, Tammy, a pastry chef. Together they enjoy triathlons and snow skiing as a way to burn off all of the goodies she brings home from the bakery.

**Pre-paid Registration Required
by Wednesday, February 18th**

**Also speaking at the meeting:
Assembly Republican
Leader Kristin Olsen**

February 20th Meeting Registration

Cost: **\$21** (members) or **\$25** (non-members) – includes buffet breakfast

Method of Payment:

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

Name: _____

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Return by February 18th to:

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

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

kimmetz@naifacentralvalley.org

No refunds. Registration is transferable.

Phone: _____

Email: _____