

**2024 AASC Annual Meeting**

**The Adolphus Hotel**

1321 Commerce Street, Dallas, TX

*\* Times are Central*

*Continuing education credit pending state by state.*

**Tuesday, March 19**

1:00pm Continuing Education Committee meeting

2:00pm Membership Committee meeting

3:00pm Legs & Regs Committee meeting

4:00pm PAC meeting

4:45pm AASC Board meeting

6:00pm-7:30pm: Opening reception

**Wednesday, March 20**

**\*EXHIBIT DAY FOR PARTNERS\***

8:00am-8:30am: Breakfast

8:30-8:45am: Welcome and introductions

8:45-10:15am: **Understanding unique state and regional trends**

Speakers: Joanna Wynes, Brian Schachter, Tanis Kelly, Dan DiVico, (Texas rep)

10:15-11:00am: **Vetting Pooled Trust Companies**

Speakers: Andrea Metcalf, Joanna Wynes

11:00am-12:00pm: **Ethics for Settlement Consultants**

Speaker: Len Blonder

12:15-2:00pm: Lunch on your own

2:00-2:30pm: AASC Report

2:30-3:30pm: **Case Studies on the Bookends of Life: Perspectives from**

**Professionals**

Speaker: George Audi

3:30-4:30pm: **Missed Tax Strategies at Settlement**

Speaker: Jeremy Babener

4:30-4:45pm: BREAK

**4:45-5:30pm: Legislative Update from Capitol Counsel**

Speaker: Dave Olander

5:30pm-6:30pm: AASC PAC reception

6:30-8:30pm: (Partner dinners)

8:30-11:30pm: President’s party

Punch Bowl Social

2600 Main Street, Dallas

*VIP Bowling Room*

**Thursday, March 21**

8:30am-9:00am: Breakfast

9:00-10:00am: Max Funded IUL: Tax Free Retirement Income Strategies

Speaker: Maurice L. Naylon, III

10:00am-noon Informational sessions on annuities, trusts, and emerging products