

# “GUARDIAN UNIVERSITY”

Tuesday, November 7, 2006

LANNY D. LEVIN AGENCY, Inc. 

presents

## “Pension Protection Act of 2006”

### Alerts & Opportunities

(3 hours CE credit applied for)

Speakers:

Jerry Kalish, National Benefit Services, Inc.

Lanny D. Levin, CLU, ChFC, LANNY D. LEVIN AGENCY, Inc.

Some of the topics

- ◆ Extension of EGTRRA Provisions
- ◆ Retirement Plan Provisions
- ◆ Long Term Care Provisions
- ◆ New 401(k) Safe Harbors
- ◆ New Rules on Taxation of Employer-Owned Life Insurance
- ◆ Charitable Rollover Rules
- ◆ New Distribution Rules for Non-Spousal Beneficiaries

**Coffee & Rolls at 8:00 a.m.**

**Class begins promptly at 8:30 a.m. (ends at 11:30 a.m.)**

**Oakton College Business Conference Center**, Golf Road, Des Plaines (just west of I-294)

Enroll at [www.levinagency.com](http://www.levinagency.com) (click on Upcoming Meetings) OR

FAX registration (on reverse side) OR

Call Phyllis Scholnick (847) 266-2243 or Email [phyllis\\_scholnick@levinagency.com](mailto:phyllis_scholnick@levinagency.com)

**JERRY KALISH** is President of **National Benefit Services, Inc.**, a Chicago-based employee benefit firm he founded in 1978. Jerry has over 30 years of experience with closely-held companies, non-profits, publicly traded companies, and government agencies. His experience includes designing, administering and terminating all types of tax-qualified retirement plans; consulting with employers on their fiduciary duties; advising clients on benefit issues in corporate transactions; and designing and administering equity compensation programs such as stock option plans and ESOPs. Jerry is a member of the Employee Benefits Committee of the Taxation Section of the American Bar Association of which he is an Associate (Non-Attorney) Member.

**LANNY D. LEVIN** is the President of the **LANNY D. LEVIN AGENCY, Inc.** and is a Chartered Life Underwriter and Chartered Financial Consultant. The firm is a life insurance boutique, specializing in wealth preservation planning, executive benefits and business succession planning. Lanny is a past President of the Chicago Estate Planning Council and has been a featured speaker for the Chicago Estate Planning Council, DuPage County Estate Planning Council, Practising Law Institute, Illinois CPA Society, Chicago Bar Association, Greater North Shore Estate Planning Council, and Chicago & Northeastern Illinois Health Underwriters. He has presented workshops and seminars for many of Chicago's top law firms and accounting firms. A majority of Lanny's time is spent working jointly with other insurance, benefits and financial professionals. He is an active member in The Association for Advanced Life Underwriting, and a Life member of the Million Dollar Round Table.

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**LANNY D. LEVIN AGENCY, Inc.** Creating Legacies, Preserving Businesses & Rewarding Executives  
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[www.levinagency.com](http://www.levinagency.com)





**LANNY D. LEVIN AGENCY, Inc.**  
**Class Enrollment Form**

*Tuesday, November 7, 2006*

**“PPA of 2006--Alerts & Opportunities ”**

YES, I will attend the class on Tuesday, November 7, 2006

**Associates & advisors are also welcome—  
Please fill out a separate registration for each one.**

Your Name	
Firm	
Address	
City, State, Zip	
Telephone	
FAX	
Email Address	

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I consent to receive newsletters, advertisements and other communications, including those sent by fax or email by (or on behalf of) LANNY D. LEVIN AGENCY, Inc. I understand that THE LEVIN AGENCY will not share my phone, fax number, or e-mail address with any third party without my prior written authorization. I can revoke this consent by contacting THE LEVIN AGENCY in writing.

X \_\_\_\_\_ (date)  
\_\_\_\_\_ (Your signature)

**Sign & Fax back this registration form to (847) 681-9501**

**or**

**call Phyllis Scholnick (847) 266-2243**

**or**

**Email [phyllis\\_scholnick@levinagency.com](mailto:phyllis_scholnick@levinagency.com)**

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