



The Heart of Financial Planning™

FPA of MD March CE Seminar: Required LTC Insurance Producer Training

**SESSION HAS BEEN ACCEPTED FOR FOUR HOURS OF CFP CE
AS WELL AS FOUR HOURS OF INSURANCE CE!**

*Maryland adopted a Regulation on Producer Training Requirements for Long Term Care insurance under COMAR 31.14.01.34. As of September 10, 2007, a producer who sells, solicits, or negotiates long term care insurance must complete a one-time training course consisting of at least 8 hours of long term care education. **A four-hour follow-up course must be completed every 24 months following.** The deadline for completing the initial course was September 10, 2008.*

To benefit licensed L/H producers in Maryland, FPA of MD has arranged for a presentation of a Maryland Insurance Administration-approved follow-up course from **8 AM-12 PM on March 11, 2010 at the Loyola College Graduate Center Timonium campus (2034 Greenspring Dr/Timonium MD 21093/410-617-1500).**

The four-hour seminar will be **co-presented by LTC insurance professionals, Jeff Merwin, CLU, RHU, CLTC** (Director of LTC Brokerage, Capitol Metro Financial Services, Inc.), **and Melissa Adams, CLTC** (Regional Vice President, Genworth Financial Long Term Care).

During the four-hour refresher course (filed with the MIA as *LTC Partnership Refresher*), **you will learn:**

- **Communicating LTC planning (old ways vs new ways)**
- **How Government programs pay**
- **Alternative strategies to traditional insurance**
- **Partnership advantages**

Members: \$65

Non-members: \$75



Jeffrey V Merwin, CLU, RHU, CLTC
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Jeff Merwin has more than 22 years in the financial services industry, working in both individual and group insurance markets. Jeff also partners with financial advisors and insurance professionals to help implement long term care planning strategies.

Jeff's value to consumers and advisors' clients in long-term care planning includes the underwriting qualification process, contract evaluation, plan design suitability, and planning strategies to implement the most efficient long-term care plan.

Jeff has been a featured speaker and a state CE instructor at local chapter meetings of Maryland Association of Health Underwriters, National Association of Insurance & Financial Advisors, Financial Planning Association of Maryland, and Maryland Association of CPAs.



Melissa Adams, CLTC
Regional Vice President
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Melissa Adams joined Genworth Financial's Long Term Care Division in 2001, after spending several years working as an Investment Consultant at Wachovia Investments. While working as an External Wholesaler in Virginia, North Carolina and South Carolina, she maintained a top-performer status. In 2004, she moved into an Internal Sales Manager role where she helped build a sales infrastructure that achieved a record-breaking \$69 MM in submitted sales in 2006. After 2 ½ years in management, Melissa rejoined the Independent Channel wholesaling team in January 2007.

Melissa develops winning LTC strategies using her financial services background as a foundation. She helps financial professionals incorporate long term care planning into their everyday business. Melissa also realizes the importance of leveraging LTC planning to identify additional sales opportunities, uncover assets, generate referral business, and create long-lasting professional networking contacts.