



MDRT

The Premier
Association of Financial
Professionals®

MDRT
ANNUAL MEETING
2009
INDIANAPOLIS

EXHIBITOR GUIDE

Indianapolis, Indiana, USA June 7-11, 2009

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Special Recognition

MDRT would like to extend congratulations and appreciation to the following companies for reaching these special exhibit year milestones.

20+ Years

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Advisys Inc. (formerly Kettley)	225
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15+ Years

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10+ Years

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5+ Years

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The Penn Mutual Life Insurance Co.	Sponsor
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Exhibit Hall Hours

Sunday, June 7	11 a.m. – 4 p.m.
Monday, June 8	11:30 a.m. – 5:30 p.m.
Tuesday, June 9	11:30 a.m. – 5:30 p.m.
Wednesday, June 10	11:30 a.m. – 3:30 p.m.

Future Meeting Dates

MDRT Annual Meeting

June 13–17, 2010	Vancouver, British Columbia, Canada
June 5–9, 2011	Atlanta, Georgia, USA
June 10–14, 2012	Anaheim, California, USA

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October 6–9, 2010	Naples, Florida, USA

MDRT Experience

March 11–13, 2010	Seoul, Korea
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Exhibitor List (alphabetical with descriptions)

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123college.com

160 S.W. 12th Ave., Suite 103B
Deerfield Beach, FL 33442 USA
Phone: +1 954.481.1234
Fax: +1 954.481.1236
Web site: www.123college.com

Since 1994, 123College.com has been the leading source for college aid planning. Our primary goal is to put agents in front of parents ages 38 to 60 to sell more products, while helping the families lower their out-of-pocket costs for college.

223

21st Services

200 S. 6th St., Suite 350
Minneapolis, MN 55402 USA
Phone: +1 612.277.0560
Toll Free: +1 877.371.3008
Fax: +1 612.371.3009
Web site: www.21stservices.com

21st Services provides customized life expectancy evaluations for longevity risk management and financial planning purposes. Life expectancies provide a responsible starting point for financial planning and product recommendations.

420

529 College Savings Programs

6811 S. 27th St.
Lincoln, NE 68512 USA
Phone: +1 888.993.3746
Toll Free: +1 866.722.7283
Fax: +1 402.323.1797
www.529csp.com

529 College Savings Programs offers a wide range of 529 options through well-known mutual fund families. Choose from portfolios offered through the College Savings Plan of Nebraska and the Bright Directions College Savings Program.

514

Advanced Settlements

2102 Park Center Drive, Suite 220
Orlando, FL 32835 USA
Phone: +1 407.296.7373
Toll Free: +1 800.561.4148
Fax: +1 407.296.7377
Web site: www.advancedsettlements.com

Advanced Settlements provides insurance professionals with multiple life settlement offers from its network of 25+ funders. Full transparency on bidding history and commission disclosure is provided for each closed transaction.

525

Advisys Inc. (formerly Kettley)

20271 S.W. Birch St., Suite 200
Newport Beach, CA 92660
Phone: +1 949.752.4927
Toll Free: +1 800.777.3162
Fax: +1 949.250.0794
Web site: www.advisys.com

Advisys Inc. (formerly known as Kettley) is the only company to offer needs analysis, client education and presentation material in a single application. Advisys products, including Back Room Technician, are used by more than 65,000 financial professionals nationwide.

501

Allianz Life

5701 Golden Hills Drive
Minneapolis, MN 55416 USA
Phone: +1 763.765.5333
Toll Free: +1 800.950.5872
Fax: +1 763.582.6401
Web site: www.allianzlife.com

Allianz Life provides fixed and variable annuities, and life and long-term care insurance in the United States. We are part of Allianz SE, one of the world's largest financial services organizations. Allianz SE is the world's 14th largest company and the third largest money manager.

506

Allstate Financial

3100 Sanders Road
Northbrook, IL 60062 USA
Phone: +1 847.402.4991
Fax: +1 847.326.5495
Web site: www.allstatepfr.com

Allstate Financial, a part of Allstate Insurance Co., provides life insurance, annuity, banking, retirement, and supplemental accident and health insurance for individual, institutional and worksite customers.

521

Amen Clinics Inc.

4019 Westerly Place, Suite 100
Newport Beach, CA 92660 USA
Phone: +1 949.266.3700
Toll Free: +1 888.564.2700
Fax: +1 949.266.3750
Web site: www.amenclinics.com

Daniel Amen, M.D., and Amen Clinics Inc. are dedicated to creating a brain-healthy world, including brain-healthy families, businesses, schools and communities. At our booth, you will find an array of tools to help you improve your brain and the brains of those you love.

513

APPS

One Jericho Plaza
Jericho, NY 11753 USA
Phone: +1 516.822.6230
Fax: +1 516.822.6241
Web site: www.applive.com

518

Ash Brokerage Corp.

7609 W. Jefferson Blvd.
Fort Wayne, IN 46804 USA

Phone: +1 260.478.0600

Toll Free: +1 800.589.3000

Web site: www.ashbrokerage.com

Ash Brokerage — big company leverage, small company feel. Our nationwide offices have experts in annuities, disability income, long-term care and life insurance, offering advisors a full service platform that supports all client needs.

520

Association for Advanced Life Underwriting

2901 Telestar Ct., 4th Floor
Falls Church, VA 22042 USA

Phone: +1 703.641.9400

Toll Free: +1 888.275.0092

Fax: +1 703.641.9885

Web site: www.aalu.org

The Association for Advanced Life Underwriting is dedicated to the promotion, preservation and protection of advanced life insurance planning.

500

Aviva Life & Annuity

611 5th Ave.
Des Moines, IA 50309 USA

Phone: +1 515.242.4476

Toll Free: +1 800.800.9882

Fax: +1 515.242.4523

Web site: www.avivausa.com

Aviva Life & Annuity is part of Aviva plc, the world's fifth-largest insurer. While Aviva plc is the oldest continuously operating insurance group in the world, with a corporate lineage dating to 1696, our focus is on creating bright futures. One Aviva, twice the value.

615

Brokerage Professionals Inc.

7910 E. Thompson Peak Pkwy., Suite 101
Scottsdale, AZ 85255 USA

Phone: +1 480.505.2500

Toll Free: +1 800.733.7729

Fax: +1 480.505.2501

Web site: www.brokeragepros.com

Brokerage Professionals Inc., a full service wholesale brokerage offering life insurance, annuities, long-term care and pension products. Additionally, Brokerage Professionals is an industry leader in impaired risk and large case markets.

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Columbus Life Insurance Co.

400 E. 4th St.
Cincinnati, OH 45202 USA

Phone: +1 513.361.6700

Toll Free: +1 800.677.9696

Fax: +1 513.361.6717

Web site: www.columbuslife.com

Columbus Life offers fixed, indexed and variable life products through independent producers — tailored to the affluent markets — with special programs for wealth transfer, retirement income management and business planning strategies.

310

Counsel Financial

1900 Silver Lake Road, Suite 314
St. Paul, MN 55112 USA

Phone: +1 651.639.8707

Toll Free: +1 800.327.9039

Fax: +1 651.639.8807

Email: Info@counselfinancial.com

Web site: www.counselfinancial.com

Meet Counsel Financial's founder and 15-year MDRT Top of the Table qualifier, Paul S. McCready, CFP, RFC. Learn how active management of variable annuities and mutual funds can double your sales.

307

Coventry

7111 Valley Green Road
Fort Washington, PA 19034 USA

Phone: +1 215.233.5100

Toll Free: +1 877.836.8300

Fax: +1 215.233.3201

Web site: www.coventry.com

As the leader and creator of the secondary market for life insurance, Coventry has delivered more than USD 2.7 billion to consumers, creating more options and enormous opportunities for advisors and policy owners alike.

221

DI Broker

16325 S.W. Boones Ferry Road
Lake Oswego, OR 97035 USA

Phone: +1 503.636.2112

Toll Free: +1 877.636.2112

Fax: +1 503.636.2144

Web site: www.dibroker.com

If you give expert advice, get expert advice from the professionals at DI Broker, the nation's leading individual disability insurance, long-term care and critical illness brokerage agency. You deserve more.

419

Disability Insurance Services

4444 Zion Ave., Suite B
San Diego, CA 92120 USA

Phone: +1 619.284.8444

Toll Free: +1 800.898.9641

Fax: +1 619.284.8474

Web site: www.diservices.com

Disability Insurance Services is a wholesale operation that offers real solutions for individual disability insurance, business overhead expense and buy/sell products of the nation's leading carriers. Earn more and work less.

Exhibitor List (alphabetical with descriptions) *continued*

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Ed Slott & Company LLC

100 Merrick Road, Suite 200 E
Rockville Centre, NY 11570 USA

Phone: +1 516.536.8282

Toll Free: +1 800.663.1340

Fax: +1 516.836.885

Web site: www.irahelp.com

Ed Slott's *IRA Advisor* is a monthly newsletter to expand your knowledge and increase earning capacity. We also offer "2 Day Instant IRA Success" workshops and provide information about membership in Ed Slott's Elite IRA Advisory Group.

408

eFileCabinet Inc.

5252 N. Edgewood Dr., Suite 250
Provo, UT 84604 USA

Phone: +1 877.574.5505

Toll Free: +1 877.574.5505

Fax: +1 801.375.5506

Web site: www.efilecabinet.com

eFileCabinet offers a comprehensive suite of electronic document management and online backup products and services that enable users to work quicker, smarter and more efficiently.

418

EMSI

606 E. Algonquin Road, Suite 205
Arlington Heights, IL 60005 USA

Phone: +1 847.806.0513

Fax: +1 888.299.4535

Web site: www.emsinet.com

614

Etherington & Vukets

12 Madison Ave.

Toronto, ON M5R 2S1 Canada

Phone: +1 416.351.1464

Toll Free: +1 888.633.6744

Fax: +1 416.351.9927

Web site: www.etheringtonsvukets.com

Bruce Etherington's book, "See the People," (available in English, Spanish and Chinese) and his CD sets, "Acorns to Oak Trees" and "Virtuoso to Maestro," are available. Come by and meet Bruce.

211

ExamOne

10101 Renner Blvd.

Lenexa, KS 66219 USA

Phone: +1 913.888.1770

Toll Free: +1 800.873.8845

Fax: +1 913.859.6992

Web site: www.examone.com

ExamOne, a Quest Diagnostics company, is the nation's leading provider of risk assessment information for the life insurance industry. Our integrated supply chain includes paramedical exams, lab testing, attending physician statements, teleunderwriting and inspections.

424

Expedia CruiseShipCenters

203-1755 W. Broadway

Vancouver, BC, V6J 4S5 Canada

Phone: +1 604.736.5089

Toll Free: +1 877.736.5089

Fax: +1 604.736.2241

Web site: www.cruiseshipcenters.com/briananderson

Canada's largest seller of cruises is looking forward to meeting you in Indianapolis to assist you with your travel plans, especially related to the cruise and land tour options available for you to enjoy before or after the 2010 MDRT Annual Meeting in Vancouver!

306

E-Z Data Inc.

918 E. Green St.

Pasadena, CA 91106

Phone: +1 800.777.9188

Fax: +1 800.777.7620

Web site: www.ezdata.com

E-Z Data's proven SmartOffice solution for practice and agency management are used by today's top MDRT producers, including Jennifer Borislow, Adelia Chung and Marc Silverman. Learn why at www.ezdata.com.

414

First Heartland Capital Inc.

1839 Lake Saint Louis Blvd.

Lake Saint Louis, MO 63367

Phone: +1 636.625.0900

Fax: +1 636.625.0990

Web site: www.firstheartland.com

The search is over! A truly independent broker-dealer. A full service brokerage general agency. An innovative registered investment advisor. Maximize your payout on both life and securities commissions.

515

Ghirardelli Chocolate

1111 139th Ave.

San Leandro, CA 94578

Phone: +1 510.772.7829

Fax: +1 925.284.1706

Web site: www.ghirardelli.com

As America's oldest chocolate manufacturer, Ghirardelli has been creating premium chocolate for corporate gifts for 155 years. We hand-select cocoa beans and use the purest ingredients for our award-winning chocolate.

315
MDRT Foundation Global Gift Fund

325 West Touhy Avenue
Park Ridge, IL 60068 USA

Phone: +1 847.692.6378

Fax: +1 847.518.8921

Web site: www.globalgiftfund.org

Global Gift Fund is the donor-advised service of the MDRT Foundation. Discover the magic of donor-advised funds: You manage the investment, your client recommends the charity and Global Gift Fund handles the details.

320
Guzzardo Leadership Group

109 Holly Ridge Road
Stockbridge, GA 30281

Phone: +1 770.474.1889

Fax: +1 770.474.0442

Web site: www.tomguzzardo.com

Guzzardo Leadership Group (GLG) specializes in business development coaching. GLG provides business coaching, keynotes, workshops and audio products to dramatically enhance personal and organizational performance.

525
Hartford Life

200 Hopmeadow St.
Simsbury, CT 06089 USA

Phone: +1 404.316.5577

Fax: +1 860.843.3369

Web site: www.hartfordinvestor.com

The Hartford is one of the nation's largest financial services companies and a leading provider of investment products, life insurance and group benefits; automobile and homeowners products; and business property and casualty insurance.

314
Hooper Holmes / Portamedic

1345 Cedar Park Place
Stone Mountain, GA 30083 USA

Phone: +1 404.299.7148

Toll Free: +1 800.782.7373

Fax: +1 404.299.8115

Web site: www.hooperholmes.com

Hooper Holmes / Portamedic offers exams, APSs, PHIs and other underwriting services via Internet, file download or indexed image. E-submission/document management programs are also offered to meet your electronic application needs — all tailored to fit your workflow.

509
IARFC

2507 N. Verity Pkwy.
Middletown, OH 45042 USA

Phone: +1 513.424.6395

Toll Free: +1 800.532.9060

Fax: +1 513.424.5752

Web site: www.iarfc.org

IARFC is a non-profit professional association dedicated to educating, training, supporting and advancing the professionalism of financial advisors who are helping people spend, save, insure, invest and plan for the future.

519
Identity Branding / e-Relationship

3300 Battleground Ave., Suite 250
Greensboro, NC 27405 USA

Phone: +1 336.303.1000

Toll Free: +1 800.851.8169

Fax: +1 336.303.7318

Web site: www.identitybranding.com

An extra USD 10,000 in commissions per advisor: Would that affect your bottom line? The average increase for advisors using e-Relationship is higher — much higher. Get details on the financial industry's leading, compliance-approved e-connection tool!

600
Impact Technologies Group Inc.

10735 David Taylor Drive, Suite 350
Charlotte, NC 28262 USA

Phone: +1 704.549.1100

Toll Free: +1 800.438.6017

Fax: +1 704.549.5700

Web site: www.impact-tech.com

300
ING

20 Washington Ave. S
Minneapolis, MN 55401 USA

Phone: +1 612.342.7930

Toll Free: +1 866.464.7355

Fax: +1 612.342.7634

Web site: www.ing-usa.com

Based in Amsterdam, ING Groep N.V. offers banking, insurance and asset management to over 85 million private, corporate and institutional clients in more than 50 countries.

309
Integrity Life Settlements

350 5th Ave., Suite 1827
New York, NY 10118 USA

Phone: +1 212.868.3850

Fax: +1 212.868.3854

Web site: www.ilifsettlements.com

Integrity Life Settlements, one of the premier and well respected settlement brokerages in the industry, and an LISA member, is seeking producers (and others willing to be licensed) for franchise type opportunities. Call chief executive officer Alex Sirotkin at (212) 868-3850.

Exhibitor List (alphabetical with descriptions) *continued*



207

John Hancock Financial Network

197 Clarendon St., C-8

Boston, MA 02116 USA

Phone: +1 617.572.6524

Toll Free: +1 800.803.5194

Fax: +1 617.421.4175

Web site: www.jhnetwork.com

John Hancock Financial Network is a national network of independent career firms, bringing together the best attributes of the traditional career agency system and the independent broker-dealer.

311

Keir Educational Resources

4785 Emerald Way

Middletown, OH 45044 USA

Phone: +1 513.422.4860

Toll Free: +1 800.795.5347

Fax: +1 800.859.5347

Web site: www.keirsuccess.com

Keir Educational Resources develops study media for the financial planning industry. Keir provides study media and courses for CFP, CLU, ChFC, CPCU, CFA and a range of securities licensing exams. Visit Keirsuccess.com for a list of products and services.

313

LIFE Foundation

1655 N. Fort Myer Drive, Suite 610

Arlington, VA 22209 USA

Phone: +1 202.464.5000

Fax: +1 202.464.5011

Web site: www.lifehappens.org

The Life and Health Insurance Foundation for Education (LIFE) is a non-profit organization designed to address the public's growing need for information and education on life, health, disability and long-term care insurance.

409

Life Settlement Providers

6302 N. Point Road

Baltimore, MD 21219 USA

Phone: +1 410.477.1976

Toll Free: +1 866.509.5534

Fax: +1 410.477.1978

Web site: www.lifeselementproviders.com

Life Settlement Providers helps seniors maximize cash flow by converting qualified life insurance policies directly into cash — at an amount that exceeds the cash surrender value of policy.

412

Life Settlement Solutions Inc.

9201 Spectrum Center Blvd., Suite 105

San Diego, CA 92123 USA

Phone: +1 858.576.8067

Fax: +1 858.576.9329

Web site: www.lss-corp.com

Life Settlement Solutions Inc. is one of the leading settlement providers in the United States and is widely recognized as an industry leader.

512

LTCl Partners LLC

100 Field Drive, Suite 140

Lake Forest, IL 60045 USA

Phone: +1 800.245.8108

Fax: +1 847.680.9112

Web site: www.ltclipartners.com

LTCl Partners LLC is a full-service brokerage general agency dedicated exclusively to long-term care insurance. Our services include traditional, corporate and asset-based products. Our application partner team will take the application on your behalf.

319

MassMutual Financial Group

1295 State St.

Springfield, MA 01111 USA

Phone: +1 413.744.2385

Toll Free: +1 800.767.1000

Fax: +1 413.744.2834

Web site: www.massmutual.com

MassMutual Financial Group is a marketing name for Massachusetts Mutual Life Insurance Co. (MassMutual). MassMutual and its subsidiaries had more than USD 500 billion in assets under management at year-end 2007.

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MDRT Member Resource Center

325 West Touhy Avenue

Park Ridge, IL 60068 USA

Phone: +1 847.692.6378

Fax: +1 847.518.8921

Web site: www.mdrt.org

Visit the Member Resource Center to discover how to take advantage of your membership benefits, including the MDRT/GAMA International Mentoring Program, expert advice on promoting your business and how MDRT provides solutions.

415

Midland National

One Sammons Plaza

Sioux Falls, SD 57193 USA

Phone: +1 605.335.5700

Toll Free: +1 800.843.3316

Fax: +1 605.373.8559

Web site: www.mnlife.com

Midland National and Sammons Securities Co. are members of a uniquely structured, privately-owned financial services group with competitive products and comprehensive technology platforms wrapped within a relationship-driven culture.

407

MuniMetriX Systems Corp.

1575 Delucchi Lane, Suite 223

Reno, NV 89502 USA

Phone: +1 800.548.7895

Fax: +1 775.334.4788

Web site: www.munimetrix.com

MuniMetriX Systems Corp. provides paperless office solutions. Desktop-based and web-based solutions are available, which are both SEC/NASD compliant. Become more efficient, legally destroy your paper files, protect yourself from disaster and increase the value of your business.

215

Mutual Trust Financial Group

1200 Jorie Blvd.

Oak Brook, IL 60523 USA

Phone: +1 630.684.5477

Toll Free: +1 800.323.7320

Fax: +1 630.684.5495

Web site: www.mutualtrust.com

Mutual Trust Financial Group offers a comprehensive collection of financial products and services for estate, retirement and business planning. Specializing in participating whole life since 1904, we provide personal service, sales tools and advanced marketing expertise.

422

Myera

411 Duplex Ave., Suite 2002

Toronto, ON M4R 1V2 Canada

Phone: +1 416.440.0820

Fax: +1 416.932.2556

Web site: www.myera.com

Myera delivers educational programs to meet the unique challenges of today's boomer. Learn how financial professionals can gain a highly competitive advantage by effectively and intelligently reaching the boomer market.

421

National Association of Insurance and Financial Advisors

2901 Telestar Court

Falls Church, VA 22042 USA

Phone: +1 703.770.8100

Toll Free: +1 877.866.2432

Fax: +1 703.770.8499

Web site: www.naifa.org

The National Association of Insurance and Financial Advisors (NAIFA) represents 54,000+ insurance and financial advisors nationwide. With more than 750 state and local associations, NAIFA provides connections that count through advocacy, training and networking opportunities.

608

Nationwide Financial Network

One Nationwide Plaza 1-07-102

Columbus, OH 43215 USA

Phone: +1 302.452.4000

Toll Free: +1 800.523.4681

Fax: +1 302.454.4334

Web site: www.nationwide.com

406

Ohio National Financial Services

One Financial Way

Cincinnati, OH 45242 USA

Phone: +1 513.794.6100

Toll Free: +1 800.242.1894

Fax: +1 513.794.4799

Web site: www.ohionational.com

Discover the opportunity and independence you want with Ohio National. Marketing a competitive contract and comprehensive product portfolio, Ohio National offers excellent ratings, financial strength and stability.

Exhibitor List (alphabetical with descriptions) *continued*

- 101**
OneAmerica Financial Partners
One American Square
Indianapolis, IN 46206 USA
Phone: +1 317.285.1764
Fax: +1 317.285.1781
Web site: www.oneamerica.com
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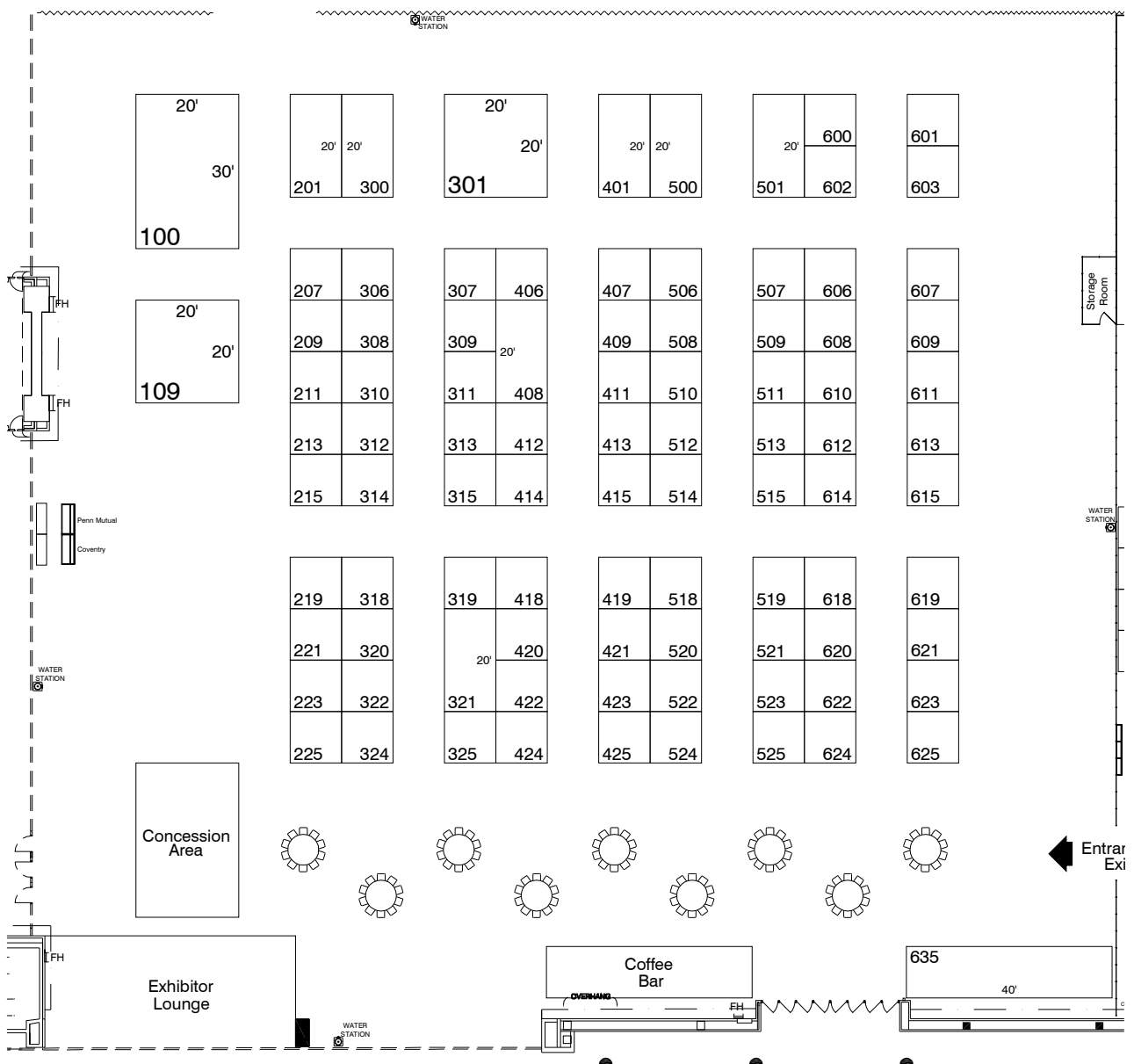
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