BOOMERTIREMENT® ROAD SHOW

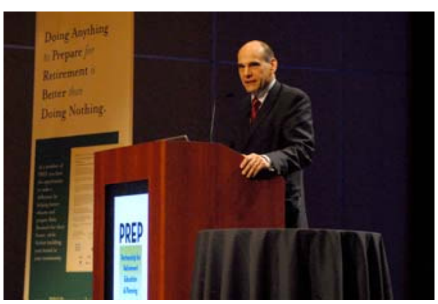
Sponsored by PREP

Partnership for Retirement Education and Planning

Boomertirement® Road Shows Provided Takeaway Solutions to Help Baby Boomers in Tough Economic Times

The Boomertirement® Road Shows were held in Dallas, Washington, D.C., Chicago, Los Angeles and New York City in late Feb. and early March. During the morning seminars, industry professionals gathered to hear some of the nation's premier retirement planning experts unveil new research financial advisors can use to help Baby Boomers plan for their future.

Philip Harriman, partner in Lebel & Harriman, LLP, past president of the Million Dollar Round Table (MDRT) and spokesperson for the Partnership for Retirement Planning and Education (PREP), set the stage for all five Road Shows by reminding attendees about current affairs that make their jobs more important than ever. He also shared many business resources available to members of MDRT, NAIFA and FSP. Harriman travels frequently, speaking on a variety of topics including estate planning and business succession and leadership.



James Tyrpak, president of Desmon, Kohnstamm & Tyrpak, Inc., a wealth preservation and business continuity firm in Buffalo, NY and past president of the Society of Financial Service Professionals (FSP), discussed how lifestyle and attitudes affect the Boomer generation as they plan for retirement.

Jeffrey Taggart, general agent at UNIFI Companies and past president of the National Association of Insurance and Financial Advisors (NAIFA), discussed how life income and life boats affect how Boomers plan for retirement. Taggart focuses on the business and estate planning markets.

Matt Thornhill, founder and president of the Boomer Project, the consultancy that conducted research in January 2009, surveyed 600 top financial advisors about best practices for working with the Baby Boomer generation. A thought leader in the field of Boomer studies, Thornhill speaks frequently and leads workshops around the country more than 40 times a year.

The Social Security Administration also spoke at each of the Road Shows on their newest online resources to help Boomers plan for retirement. Pictured is James Martin, regional commissioner for the Chicago Region of Illinois, Indiana, Michigan, Minnesota, Ohio and Wisconsin, speaking at the Chicago Road Show.

Tom Hegna, vice president of New York Lift Insurance Company and NAIFA and FSP member, delivered *Ideas to Help Boomers Plan for Their Future*. Hegna has given more than 2,000 Retirement Planning Seminars across the country.

Each Road Show ended with a panel Q&A session, allowing attendees to ask each of the speakers follow-up questions regarding their recommendations on how to help Boomers best plan for their future and eventual retirement during these tough economic times.