

**Medicaid Planning Seminar (education and sales/marketing)**

Fill out this order form and get ready to take your consulting to the next level!

**2 day Education Educational/Marketing Seminar To help you earn more money!**

Education

- Medicaid rules and their state variances
- How are IRA's or 401K's treated
- Rules on Residences
- Rules on Income
- Rules on spend down and allowed expenditures
- Rules on Medicaid Recovery
- Identification of assets
- Rational liquidation of assets to minimize tax exposure
- Sensible spend down of assets with allowable expenditures

Medicaid Annuities

- What are they
- How to properly use them in a Medicaid Plan
- The available products in the marketplace

Marketing!

- Turn-key Public Seminars
- Turn-key Direct Mail: highly targeted, averaging 5% response rate nationally
- Agent Branded CD: 45 minute powerful presentation "Medicaid Secrets Revealed"
- Medicaid Planning Book: written by Certified Elder Law Attorney Don Chapin. Forward by the local agent
- Monthly Newsletter: branded to agent and sent out to end-user prospects/clients, organizations and referral partners
- Web 2.0: weekly training on setting up agent blog, social media marketing (Twitter/Facebook), video marketing, email marketing/communication

Are you **tired of competing** with local advisors for cases? Are you tired of being seen as a **product pusher**? If so, you should attend the **only Medicaid planning course in the industry** to become a **problem solver** for your clients instead of a product pusher. With the new case law making **Medicaid annuities** viable again, by learning how to properly use them to help your clients, you will **significantly increase your income** and you will stop competing against your competition for client.

**Registration Form for the December 7-8<sup>th</sup> Las Vegas Training**

Late Registrations will be accepted. **Seating, however, will be limited.**

**\$195** for CWPP, CAPP, or MMB advisors (or those in training).

**\$195** for those licensed to sell product through Strategic Marketing Partners ([www.strategiccmp.net](http://www.strategiccmp.net))

**\$295** for early sign ups (prior to November 22<sup>nd</sup>) who do not qualify for the \$195 rate.

**\$395** for non-early sign ups

**Personal Information-** Please fill in your name and e-mail or fax the form back to [info@thewpi.org](mailto:info@thewpi.org) or fax: 313-887-0532

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

3. **Payment to Accompany Form:**  Check Payable to Rocco DeFrancesco  Credit Card Total \$ \_\_\_\_\_ 3 digit CC ID: \_\_\_\_\_

4. **Credit Card Payment Options:**  Visa or MC Number: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

**Return completed registration form and payment to:** 3260 S. Lakeshore Dr., St. Joseph, MI 49085. Fax: **313-887-0532**