

**PENSCO Trust Self-directed Retirement Investing Symposium**  
**(CE Credits available, please check website for details)**

**Thursday, 3/5/09**

**TRACK ONE - Beginner**

**TRACK TWO - Intermediate/advanced**

7:45 - 8:15	Registration & Continental Breakfast	
8:15 - 8:30	Welcome & Introduction	
8:30 - 9:15	<b>Keynote:</b> Recent Developments Affecting Self-directed IRAs Trends & Opportunities -- Tom Anderson, CEO, PENSCO Trust Company	
9:30 - 10:30	Earning Fast Profits in Hard Times -- Jordan Goodman, America's Money Answers Man, featured on CNBC, MSNBC, Fox News & more	How to Avoid Prohibited Transactions: Master the Rules and Regulations -- Tom Anderson, CEO, PENSCO Trust Company
10:30 - 10:45	Break	
10:45 - 11:30	How to Create IRA Wealth with Real Estate -- Pat Rice, Author of IRA Wealth	Learn the Truth About UBIT & Hidden Benefits -- Eric Wikstrom, CPA, Integrated Wealth Strategies
11:30 - 12:15	Leveraging Real Estate with an IRA: What Your Clients Should Know -- Matt Allen, Director of IRA Lending, North American Savings Bank	Smart Tax-efficient Exit Strategies -- Barry Picker, CPA/PFS, CFP,
12:15 - 1:30	Lunch and Networking	
1:30 - 2:30	Strategies for Professionals to Drive New Revenue with Self-directed IRAs -- Michael Scott, VP of Sales, PENSCO Trust Company	How Financial Advisors Attract New Clients with Self-directed IRAs & Increase Assets -- John Napolitano, CFP/CPA/CEO, U.S. Wealth Management, LLC
2:30 - 3:30	How to Open and Fund Self-directed Investments in Real Estate & Private Equity -- Tom Anderson, CEO, PENSCO Trust Company	How to Structure LLCs to Invest Your Retirement Funds - Legal & Practical Issues -- Matthew Flamm, Attorney, Flamm, Teibloom & Stanko, LTD
3:30 - 3:45	Break	
3:45 - 4:30	Attendee Contest	
5:00 - 6:00	Cocktail Party	

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**Friday, 3/6/09**

8:00 - 8:30	Networking & Continental Breakfast
8:30 - 9:15	Q & A, Meet the Speakers
9:30 - 10:30	<p><b>Choose between A or B workshop</b></p> <p><b>Workshop A</b> - Defer Capital Tax Gains with 1031 Exchanges, Wendy L. Craft, Esq, Hudson Land Company, LLC</p> <p><b>Workshop B</b> - Discover High-yield Investments with Rehab Loans, Anthony (A.J.) Funaro, Brookview Financial</p>
10:30 - 10:45	Break
10:45 - 11:45	<p><b>Choose between A or B workshop</b></p> <p><b>Workshop A</b> - Get More Leads &amp; Clients Using YouTube, LinkedIn, Twitter and the Cocktail Napkin Marketing Plan™-- Robyn K. Levin, CEO, R. Levin Marketing Group</p> <p><b>Workshop B</b> - How to Open and Fund Private Placements, Rob Spalding, Business Development Officer, PENSCO Trust Company</p>
11:45 - Noon	Break
Noon - 1:00	<p><b>Choose between A or B workshop</b></p> <p><b>Workshop A</b> - How to Invest in Tax Liens and Get Double Digit Returns, Jack Cahill, CEO, Lien Quest</p> <p><b>Workshop B</b> - How to Invest Your IRA in Private Equity &amp; Real Estate Using LLCs, Tom Anderson, CEO, PENSCO Trust Company</p>
1:00 - END	

You will walk away with in-depth knowledge, new insights, great connections and FREE bonus items.

\* Agenda is subject to change without notice.

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