There are two timely and important issues we will cover for over 100 expected attendees:

- A panel discussion (1 Hour CE) on the just-finalized regulation by the Federal Department of Labor on fiduciary liability. This will directly affect every insurance producer who has a client with either an IRA or a qualified plan. One of our panelist is Judi Carsrud, who led NAIFA’s effort on this issue and can speak with authority on the effect of the regulation on relationships between insurance producers, financial advisors, and the clients of both groups.

- Another panel discussion (1 Hour CE) that is equally important and which is tied to the DOL fiduciary rule, is the retirement legislation. After four years of failed attempts to enact a state-run retirement program for employees of private employers, the Maryland legislature approved an initiative this year creating a program to offer IRAs to this group of individuals. Because this legislation contemplates a mandate, all Maryland insurance producers with business clients will be affected, and our panel discussion will advise those producers how they may take advantage of this new law. State Senator Andrew Serafini, a financial advisor and respected leader on this issue, will be one of the panelists.

Another major change this year that will be discussed by our luncheon speaker, Tom Petersen, is the ability to obtain both individual disability insurance and short-term medical insurance from a surplus lines insurer in Maryland. This change will expand product availability for these lines for many Maryland producers.