



“403(b) and Non-Qualified Plans” with Lawrence B. Raymond, CLU, ChFC, CPC, CFP

Larry Raymond is a graduate of the University of Michigan with an MBA majoring in Finance and Actuarial Science. Upon graduation, he entered the financial services industry in 1975 and is the President and a principal shareholder of Alliance Benefit Group of Michigan, Inc. He is a member of ASPPA and served on its ethics committee and currently serves on the IRS EP/EO Council. He also assisted in coauthoring the Study Guide for the American College on Retirement Plans. He was the 2006 recipient of the E.H. “Bill” Meyers, Jr. Memorial Award, NAIFA Greater Detroit.

Larry joined AALU, the Association for Advanced Life Underwriting, in the early 1980’s and was appointed to the Board of Directors in 2001 and elected to the Executive Committee in 2004. He served as its President during the 2007-2008 fiscal year and currently serves as the Chairman of AALUPAC, its political action committee. Larry has also offered testimony on behalf of the industry and AALU in front of the U.S. Treasury Department on both 412(i) legislation and 403(b) proposed tax legislation.

He is actively involved in the sale of qualified and nonqualified retirement plans as well as working with business owners on planning for the transfer of their businesses and wealth to future generations.

Larry lives in Bloomfield Hills, Michigan and is married with three children.

Wednesday, September 17, 2008
11:30 a.m. – 2:00 p.m.

NOTE: Space is limited so register early

Radisson Hotel Detroit-Bloomfield Hills (Kingsley Inn)

39475 Woodward Ave.
Bloomfield Hills, MI 48304
(248) 644-1400

Payment in advance: (Sorry, Refunds Not Available)

\$45 ABC of Detroit Members
\$75 Non-Members

Agenda:

11:30 a.m. Registration
11:30 a.m. – 12:00 p.m. Lunch (provided)
12:00 p.m. – 2:00 p.m. Presentation

Qualifies for 2.0 CE credits for ASPPA members

Speaker Disclaimer: The statements and materials presented at the ABC of Detroit are solely the opinions of the speakers and do not represent the opinion or the position of the ABC of Detroit. The ABC of Detroit does not assume any responsibility for the contents of the statements and materials presented.

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