



NOVEMBER LUNCHEON PROGRAM

“NOW WHAT? A WASHINGTON UPDATE FROM AALU AFTER THE 2018 MID-TERM ELECTIONS”

TUESDAY, NOVEMBER 13, 2018

THE UNION LEAGUE
140 SOUTH BROAD STREET
PHILADELPHIA, PA 19102

11:45 – 12:00 P.M. REGISTRATION
12:00 – 12:30 P.M. LUNCHEON
12:30 – 1:45 P.M. PROGRAM

With the 2018 mid-term elections now behind us, what will the results mean for the legislative agenda in Washington? How might the outcome impact your business? Chris Morton of AALU will provide an informative update on tax and regulatory issues that affect you, the life insurance industry, the broader financial services community, and the conversation you are having with your clients.

**One Education Credit for CLE (PA Only), Insurance (PA Only), CFP,
CPA (PA Only), PACE and CTFA will be offered.**

Speaker:

Chris Morton, Senior Vice President, Government Affairs, at The Association for Advanced Life Underwriting (AALU), acts as a principal liaison to Congress on behalf of the nation's top life insurance producers and distribution partners, managing all policy development, political engagement, and advocacy strategy for the Association in Washington, DC.

A seasoned Washington professional with 20 years of experience in the financial services and tax policy arena at the Federal level, Mr. Morton has demonstrated success in numerous legislative and regulatory affairs leadership roles.

Prior to joining AALU, he was a senior analyst and advisor in the Business Strategy Group at Fannie Mae. In this role, Mr. Morton was responsible for providing leadership and strategic direction to the Company's senior executives on a broad array of public policy challenges affecting the Company's business and markets.

Mr. Morton also served as a policy advisor and senior member of the management team at the Federal Housing Finance Board, an agency responsible for supervising the Federal Home Loan Bank System, a government-sponsored cooperative of 12 regional wholesale financial institutions with \$1 trillion in assets and over 8,000 members nationwide.

This meeting is being sponsored by



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**NOVEMBER 13, 2018 LUNCHEON PROGRAM
REGISTRATION FORM**

Luncheon Program Fee:

PEPC Members	\$45	Non-Members	\$65
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Additional Fees:

CLE Credit (Members)	\$15	CLE Credit (Non-Members)	\$15
Insurance Credit (Members)	\$15	Insurance Credit (Non-Members)	\$15
CFP® Credit (Members)	\$15	CFP® Credit (Non-Members)	\$15

\$5 additional charge for walk-in registrations at the door without pre-registration.

No-shows will be billed. No refunds after November 9, 2018.

ATTENDEE INFORMATION:

Name: _____ Discipline: _____

Company: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

PEPC Member (\$45 per person) Non-Member (\$65 per person)

Please select your lunch entrée:

Three Hour Beef Short Rib, Country Mashed Potatoes, Baby Carrot, Red Wine Jus

Wild Mushroom Tart with Caramelized Onion and Grana Padano, Micro Arugula

Special Dietary Needs: _____

CONTINUING EDUCATION INFORMATION:

(Members: Add \$15 per credit • Non-Members: Add \$20 per credit)

Continuing Legal Education (1 credit).....Attorney ID: _____

Insurance Continuing Education (1 credit).....License Number: _____

CFP® Continuing Education (1 credit).....Last 4 Digits of SSN: _____

CTFA, PACE and CPA Credits available onsite at the meeting at no additional charge.

PAYMENT INFORMATION:

Check Payment (Payable to PEPC)

Credit Card Payments – **Website Only**

PEPC is no longer accepting credit card payments via faxed or mailed registration forms. Any credit card payments must be submitted through our secure website at www.philaepc.org. **Members must be logged into the site to receive the discounted member pricing.**

Return by Mail: Philadelphia Estate Planning Council, P.O. Box 579, Moorestown, NJ 08057

Return by Fax: 856-727-9504 **Register Online:** www.philaepc.org

Questions: 215-486-6215 (*Registrations will not be accepted via phone*)