

CONNECT with success

National Sales Conference

Crowne Plaza St. Paul - Riverfront

Tuesday, September 11, 2012

12:00 - 7:00 p.m. Registration Window (lower level) Registration

7:00 - 9:00 p.m.

Welcome reception

Capitol Ballroom

Wednesday, September 12, 2012

7:00 - 8:00 a.m. Capitol Ballroom

Exhibit area open

Breakfast

8:00 – 8:15 a.m.

Opening remarks

Minnesota Ballroom

Kevin Bachmann, President

Keynote speaker: Joe Pine

8:15 - 9:15 a.m.

Welcome to the experience economy

9:15 - 9:30 a.m.

Break

Capitol Ballroom

Exhibit area open

9:30 - 10:30 a.m. Minnesota Ballroom

Questar and the technology experience

Alex Barned, Chief Distribution Officer Matthew Fries, Chief Investment Officer



10:30 - 10:45 a.m.

Field Advisory Board introduction Alex Barned, Chief Distribution Officer



10:45 - 11:45 a.m.

The 2012 elections and their implications for

the life and annuity industry

Peter Lefkin, Senior Vice President of Government and

External Affairs, Allianz of North America



11:45 - 1:00 p.m.Capitol Ballroom

Lunch with Questar Capital home office

Exhibit area open

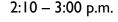


1:00 - 2:00 p.m.Minnesota Ballroom The global economy, its present state

Christopher Morahan, BlackRock Portfolio Manager

2:00 – 2:10 p.m.

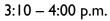
Transition to first breakout session



Breakout session 1

3:00 - 3:10 p.m.

Transition to second breakout session



Breakout session 2

4:00 – 4:10 p.m.

Transition to third breakout session

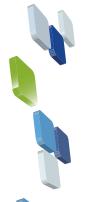
4:10 - 5:00 p.m.

Breakout session 3

Evening

Dine arounds - Sponsored by our strategic partners.





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Thursday, September 13, 2012



7:00 – 8:00 a.m. Capitol Ballroom

8:00 – 8:05 a.m. Minnesota Ballroom

8:05 - 8:30 a.m.

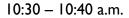


8:30 - 9:15 a.m.



9:15 – 9:30 a.m. Capitol Ballroom

9:30 – 10:30 a.m. Minnesota Ballroom



10:40 – 11:30 a.m.

11:30 – 12:30 p.m. Capitol Ballroom

12:30 – 1:20 p.m.

1:20 - 1:30 p.m.

1:30 - 2:20 p.m.

2:20 – 2:30 p.m. Capitol Ballroom

2:30 - 3:20 p.m.

3:20 - 3:30 p.m.

3:30 – 4:30 p.m.

Minnesota Ballroom

4:30 – 4:45 p.m.

6:00 - 9:00 p.m.

Breakfast

Exhibit area open

Welcome

Kevin Bachmann, President

Distribution, a look ahead

Tom Burns, Chief Distribution Officer

Allianz Life Insurance Company of North America

Questar and industry update

Alex Barned, Chief Distribution Officer

Break

Exhibit area open

Tax-efficient strategies in retirement

Jim Johnson, Vice President Advanced Markets
Allianz Life Insurance Company of North America

Transition to first breakout session

Breakout session I

Lunch with Questar Capital home office

Exhibit area open

Breakout session 2

Transition to third breakout session

Breakout session 3

Break

Exhibit area open

Breakout session 4

Transition to general session

Are you still relevant?

Keynote speaker: Ross Shafer

Wrap-up

Kevin Bachmann, President

Riverboat Dinner cruise





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Friday, September 14, 2012

7:00 - 7:30 a.m. Capitol Ballroom 7:30 - 8:30 a.m. Minnesota Ballroom

8:30 - 10:00 a.m.

10:00 - 10:15 a.m.

10:15 – 10:45 a.m. Governors Hall I

Governors Hall V

10:45 - 10:50 a.m. 10:50 - 11:30 a.m. Minnesota Ballroom

II:30 a.m. Capitol Ballroom

Agenda subject to change

Breakfast

Annual compliance meeting

Firm Element general session

Know your customer and suitability rules overview Customer complaints: guidance and firm policies AML annual update 2012

Break

Firm Element breakout session

-Series 6 and/or Series 7

Deferred variable annuities: your responsibilities under Rule 2330

-IA with securities registration
Investment advisers: Code of conduct

Transition to general session

Firm Element general session

Ethics requirement

Box lunch

