



Grand Rounds

FREE FOR
MCMS
MEMBERS
AND
THEIR STAFF

Personal Finance Success Strategies

Date: Wed., August 8, 2018
Time: 7:30 am—8:30 am
Place: Monroe County Medical Society
The Park at Allens Creek Rd.
132 Allens Creek Road
Rochester, NY 14618

MCMS & 7th District Members & Staff: Free Non-members: \$20 per person



Charles J. Sellers, III President
Kate Sellers Vice President & Counsel

Mark A. Paganelli, CFP Co-Founder & Managing Partner
Dan James, MBA Financial Advisor & Partner

DISABILITY AND LIFE INSURANCE

- What to look for in a disability policy
- How much disability and life insurance you should have
- How to use different types of life insurance for financial protection
- Personal liability insurance coverage

Charles has worked with physicians to help them insure their incomes and their practices for more than 45 years. Among the insurance designations he has earned are Registered Health Underwriter (RHU), Chartered Financial Consultant (ChFC), and Chartered Life Underwriter (CLU).

Kate is a graduate of Duke Law School and practiced law for 10 years before joining her family's insurance agency. She is a Registered Health Underwriter (RHU) and a Chartered Life Underwriter (CLU) and has written articles and given presentations about insurance protection for medical offices.

RETIREMENT & INVESTMENT PLANNING

- Individual Retirement Planning Considerations
- Selecting the Correct Retirement Plan & Identifying the Correct Advice
- Active vs. Passive? Let's Talk About Both
 - ◊ Allocation
 - ◊ Investment Strategy

As a registered representative and investment advisor, Mark provides financial, retirement and investment advice. He graduated from RIT with a BS degree in Business Administration. He received his CLU and ChFC designations from the American College in 1991. He earned his Certified Financial Planner (CFP) designation in 1997.

Dan works with clients on their financial, retirement, insurance, and investment needs. He holds a Master's Degree in Business Administration from Missouri Baptist University in St. Louis, MO. He is also a graduate of Mercyhurst College in Erie, PA, with a Bachelor of Arts in Business Administration.

MCMS GRAND ROUNDS: Personal Finance Success Strategies — August 8, 2018

Online registration is available at www.mcms.org

Name(s): _____
Practice Name: _____
Phone Number: _____ E-mail: _____

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Registration Fees: MCMS and 7th District Members & Staff: FREE Non-members: \$20 per person

***Note to Nonmembers:** If you complete a MCMS membership application within three months, the registration fee will be applied to your first year's dues payment.

- Payment of \$_____ is enclosed. (Check payable to "MCMS") Please e-mail a receipt.
 Please bill my credit card for the amount of \$_____

Cardholder Name: _____
Card Number: _____ Exp. Date: _____ Verification Code: _____
Address associated with card: _____ Zip: _____
Signature: _____

Send completed form and payment to: Monroe County Medical Society, 132 Allens Creek Rd., Rochester, NY 14618
Fax: (585) 473-7641 Email: rking@mcms.org For more info call: (585) 473-4072

MCMS Cancellation Policy: Cancellation requests must be sent via e-mail to Ronaele King at rking@mcms.org with "Cancellation Request" in the subject line. Correspondence must include event title, date and time, registrant's name, and payee's contact information. If cancellation notice is provided at least 7 days prior to the scheduled event, a refund may be requested, minus a 20% processing fee. If cancellation notice is provided at least 1 day prior to the scheduled event, a credit voucher will be issued for the full amount paid that may be used by anyone in the practice within one year of the original event date. Questions? Contact Ronaele King at rking@mcms.org or at 585-473-7573.