

JOIN US FOR A VIRTUAL CONTINUING EDUCATION SEMINAR
FOR CPA, CFP®, AEP AND CTFA PROFESSIONALS

OPTIONS FOR MATURE OR NEGLECTED INSURANCE POLICIES



Learn about the options and strategies for policies that may have outlived their purpose or no longer are meeting the objectives.



Identify how you can help clients with policies that need attention and methods to maximize the insurance asset.



Expand your understanding of how a policy review can prevent issues, resolve problems, and improve a client's situation.

By attending, you will gain useful knowledge to better serve your clients.

SPEAKERS



JOHN D. WILLIAMS, ChFC®, CLU®, TEP

Founder & CEO, Capital Formation Group, Inc.

John is a forty-three year veteran of the financial services industry. He is one of the original co-founders of CFG. He holds ChFC® and CLU® designations from The American College, a Registered Trust and Estate Practitioner (TEP #255854) designation from The Society of Trust and Estate Practitioners, a BA from Creighton University and an MA in Theological Studies from the Boston College School of Theology. He is a member of the Boston Estate Planning Council, The American Society of Financial Service Professionals and The Society of Trust and Estate Practitioners. John and his wife Mary Ann have two grown children, Jonathan and Anna. John served nine years as a Selectman in his hometown of Carlisle, MA. Avocations include running and playing guitar.



MIKHAIL VESELOV

Financial Advisor, Capital Formation Group, Inc.

Mikhail Veselov is a concert cellist and founding member of the Grammy®-nominated Neave Trio. Mikhail holds an Artist Diploma from San Diego State University, Masters of Music and Graduate Performance Degrees from the Longy School of Music of Bard College as well as a Bachelor's of Music Diploma from the Moscow State Chopin Academy.

During the COVID-19 pandemic Mikhail used the pause in performing and touring to study and passed the SIE, Series 7 and 66 exams.

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MAY 13, 2025
1:00 PM EST

WHERE

Join from a PC, Mac, iPad, iPhone or Android device:

[LINK](#)

WHAT

Approved seminar for CPA, CFP®, AEP and CTFA Professionals for 1 hour of CE credit

RSVP

By May 12 at 5:00 PM using the link:

[LINK](#)

FEE: None

CANCELLATION POLICY

Please cancel your attendance by May 12 at 5:00 PM

NUMBER OF CPE, CFP®, AEP OR CTFA CE CREDITS: 1

PREREQUISITES: CPA, CFP®, AEP, CTFA or other tax/legal/financial services professional

ADVANCE PREPARATION: None

PROGRAM LEVEL: Intermediate

DELIVERY METHOD:
Group Internet Based



CAPITAL
FORMATION
GROUP, INC.

SPEAKERS | *Continued*

SPEAKERS



MICHAEL MICHLITSCH, MBA, FLMI, CRPC®

Vice President, In Force Insurance Solutions
Valmark Financial Group

As Vice President of In Force Insurance Solutions for Valmark Financial Group, Michael leads the Valmark Policy Management Company (PMC) and Life Settlement teams. He is responsible for integrating strategies and solutions to maximize in force insurance business to best serve clients. He earned his MBA from the Opus College of Business at the University of St. Thomas and his BA in Management and Marketing from Bethany Lutheran College. He is a Chartered Retirement Planning CounselorSM (CRPC[®]) and carries the following Financial Services Designations: FLMI, CFS, CIS, CFF, CES, CAS and CTS. In addition, he holds Series 7, 24 and 66 registrations as well as Life, Health and Variable Life and Annuity licenses.



JAMES DAWSON, CFP®, CLU®

Director, Life Settlements, Valmark Financial Group

James is Director of Life Settlements for Valmark Financial Group where he is responsible for managing the day-to-day operations of the life settlement business. This includes establishing and implementing new processes and procedures, directing and facilitating the sale of policies from the initial offering through the formal case submission and acting as an escalation resource for complex and technical life settlement issues. James earned a BBA in Financial Planning from the University of Akron, graduating Summa Cum Laude. He also holds Ohio Life, Health, Accident and Variable Insurance licenses, Series 7, 24 and 66 registrations, and is a CERTIFIED FINANCIAL PLANNER[™] professional and Chartered Life Underwriter.

APPROVED NASBA SPONSOR

The insurance agents with Capital Formation Group, Inc. are affiliated with the Executive Insurance Agency, Inc.



Executive Insurance Agency Inc, a division of Valmark Financial Group, is registered with the National Association of State Boards of Accountancy (NASBA), as a sponsor of continuing professional education on the National Registry of CPE sponsors. State Boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be address to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417. Website: www.nasba.org. For more information regarding administrative policies such as complaint and refund, please contact our offices at 330-576-1234.

DISCLOSURES

Securities offered through Valmark Securities, Inc. Member FINRA/SIPC. Investment advisory services offered through Valmark Advisers, Inc., a SEC Registered Investment Advisor. 130 Springside Dr. Akron, OH 44333. (800) 765-5201. Capital Formation Group, Inc. is a separate entity from Valmark Securities, Inc. and Valmark Advisers, Inc.

CFP Disclosure:

CFP Board owns the marks CFP®, CERTIFIED FINANCIAL PLANNER[™], and CFP® (with plaque design) in the U.S.