

# SAVE THE DATE

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## ROUNDTABLES

FORWARD THINKING

**JAN**  
24-25

### PLANNING FOR HEALTH CARE IN RETIREMENT

BANK / CREDIT UNION / BROKER DEALER

**MAR**  
14-15

### INSURANCE DISTRIBUTION ROUNDTABLE

BROKER DEALER

**APR**  
25-26

### QUALIFIED PLANS/401K ROUNDTABLE

BANK / CREDIT UNION / BROKER DEALER

**MAY**  
16-17

### ANNUITY ROUNDTABLE

BANK / CREDIT UNION

**JUN**  
5-6

### ANNUITY ROUNDTABLE

BROKER DEALER

**AUG**  
27-28

### INSURANCE & ANNUITY EXECUTIVE ROUNDTABLE

SELECT LARGE BANK & BROKER DEALERS

**SEP**  
18-19

### FEE BASED ANNUITY ROUNDTABLE

BANK / CREDIT UNION / BROKER DEALER

**OCT**  
17-18

### INSURANCE DISTRIBUTION ROUNDTABLE

BROKER DEALER

**NOV**  
8-9

### ANNUITY ROUNDTABLE

BANK / CREDIT UNION

**DEC**  
5-6

### ANNUITY ROUNDTABLE

BROKER DEALER

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