

Thursday, October 8, 2015

2:45-3:45 p.m.

Focus & Spotlight Sessions



Steven A. Burgess

Burgess is a 28-year MDRT member with one Court of the Table and 15 Top of the Table honors. He is the founding principal and current president and CEO for The Burgess Group (TBG), an international firm specializing in wealth creation and wealth transfer strategies. Burgess is a pioneer in the development of traditional premium finance. He started TBG in 1999 with the focus on creating a platform to provide an unparalleled efficiency for estate, succession, corporate and charitable planning initiatives. Prior to starting TBG, Burgess was senior partner with Starworth-Burgess and Associates. There he specialized in comprehensive estate and corporate planning analysis, creating supplemental non-qualified retirement strategies for key executives and estate planning solutions for owners.

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**Premium Finance:
Often Misunderstood and Misused**
Steven A. Burgess
Plaza II

In this session, Top of the Table member Steven Burgess will talk about the best client profile and suitability for a premium finance transaction. He will also outline a holistic approach to mitigating risk and volatility for sustainability. In addition, he will discuss premium finance opportunities for the ultra-affluent.

TOP *of the* TABLE

ANNUAL MEETING 2015 | NAPLES • FLORIDA • USA

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