

SAMPLE SESSION DESCRIPTIONS

Dynamic Keynote Presentations:

Educational Debt: Will Student Loans Be the Next Bubble to Burst?

Student debt levels rose more than twice as fast as inflation over the past decade. Seven in 10 undergrads borrow student loans, and graduate and professional students routinely borrow mortgage-sized amounts. Join attorney and nationally recognized student loan expert Heather Jarvis for a fast-paced and content-rich keynote presentation. Get the key facts about interest rates, forgiveness provisions, the private refinancing market, and legislative proposals for change. Bring your toughest questions because the expert is in the house!

"It's Complicated": The Relationship Status of Education and Wealth

Is education still the ticket to financial success? More education often leads to more income, but today's students and graduates rely on borrowed money to finance higher-than-ever tuitions. Do members of Gen X and Gen Y see the same correlations between educational attainment and net worth that previous generations enjoyed? What should future generations expect? Join attorney and nationally recognized student loan expert Heather Jarvis for a fast-paced and content-rich keynote presentation addressing associations between education and financial health.

Practical Business Development Sessions:

Broaden Your Client Base with a Student Loan Management Practice

Want to develop a niche? Interested in working with Gen X and Gen Y clients? A record one-in-five households now owe student debt and high-quality and affordable student loan advice is in demand. Learn how offering student loan management advice can help you market your skills to today's young professionals and others with questions about educational debt. We'll discuss:

- Target client profiles (who needs your advice and why)
- Service offering and pricing options
- What you need to know to get started and
- Where to find support along the way

Introductory Level:

Just the Facts, Ma'am: What Every Advisor Needs to Know About Student Loans

Fundamental concepts and clear information every advisor needs about today's student loan programs including:

- How to interview your clients with student loans to identify potential issues
- What details to know about each loan and where to get that information
- What are current interest rates, who decides, and where are rates heading
- Overview of repayment plans and forgiveness provisions
- The pros and cons of student loan consolidation

Advanced Level:

Advanced Student Debt Management: A Checklist Approach to Advising Young Professionals

Doctors, lawyers, veterinarians, and other professionals nearly always finance their educations with student loans, and many owe hundreds of thousands of dollars before beginning their careers. You already know the basics. Now learn how to develop personalized student debt management plans for your clients with high student loan balances. Attorney and nationally recognized student loan expert shares her unique checklist approach to advising young professionals including evaluating consolidation, refinancing, repayment plan selection, forgiveness, and tax considerations.