



Grant Taggart Symposium

20TH ANNUAL September 18-19, 2008

This year's theme is **Turn Success into Significance Today!** The Grant Taggart Symposium, held annually, comprises a selection of educational sessions for professional and practice development in the life insurance and financial services industry. Classes and workshops are specifically provided for agents, managers, and staff and are a great way to obtain education licensing credits!

At this year's symposium, held September 18–19, 2008, we are privileged to have keynote presenter Stephen R. Covey! Register now and join us for the best conference yet!

For further program or registration information, please contact:

BYU Conferences and Workshops
Grant Taggart Symposium
136 Harman Continuing Education Building
Provo, Utah 84602-1516
Telephone 801-422-4853
E-mail us at cw136@byu.edu

For those of you cougar sports fans, please note that there is a BYU home football game the day after the symposium ends. The BYU – Wyoming game is on Saturday, September 20, at 1:00 p.m. Tickets will be available for public purchase after August 13. To purchase tickets from the BYU Ticket Office, please go to <http://www.byutickets.com> or call 1-800-322-2981 or 801-422-2981.

We look forward to seeing all of you at the 2008 Grant Taggart Symposium!



Stephen Covey



Registration

Tuition

First-Time Attendee:	\$89
Agent Early Group Registration (10 or more):	\$125 per person
Agent Early Registration (by 9/4/2008):	\$135
Agent Late Registration (after 9/4/2008):	\$155
Nonlicensed staff and secretaries:	\$35

BYU Student: Complimentary registration; please call 801-422-4853 to ensure space availability. Students wishing CE credit must pay for the symposium as first time attendee.

- **Early registration** for Grant Taggart Symposium will close September 4, 2008, at 5:00 p.m. mountain time.
- **Registration** will close September 17, 2008, at 5:00 p.m. mountain time.
- **Walk-on registration** will begin September 18, 2008, at 7:00 a.m. at the BYU Conference Center.

Registration—Four Convenient Ways to Register!

1. Online Registration

Register on the Internet with a VISA, MasterCard, American Express, or Discover credit card.

2008 Grant Taggart Symposium

Online Registration Closed: 17 Sep, 2008 5:00 PM

[View/Edit Registrations](#)

[Manage My Continuing Education Information](#)

2. Mail-in Registration

Please complete the [registration form](#)  and mail it with your payment to:

Grant Taggart Symposium
BYU Conferences and Workshops
120 Harman Continuing Education Building
Provo, UT 84602

3. Phone-in Registration

You may register using a VISA, MasterCard, or Discover credit card number by calling **(801) 422-8925**. Please register between the hours of 8:00 a.m. and 5:00 p.m. mountain time. We are closed most major holidays.

4. In-Person Registration

The Continuing Education registration desk is located at 120 Harman Continuing Education Building, BYU, Provo, Utah. Please register between the hours of 8:00 a.m. and 5:00 p.m. mountain time. We are closed most major holidays.

Continuing Education and PACE Credits

Rules for CE credit (adapted from state insurance departments and CFP Board):

- **Be on time to receive CE credit!!** The first session of the symposium begins at 8:30 a.m. on Thursday, September 18, and ends at noon. This session is approved for 3 hours of CE credit for insurance licensees. Partial credit cannot be given. A CE form for this session (Thursday main platform) will be handed out at the door until 9:00 a.m. CE credit for this session cannot be given to anyone who enters the room after 9:00 a.m.
- No CE credit is awarded for a workshop session if you arrive late (10 minutes or more after the session begins), or if you leave a workshop early.
- If you are not in the room when the forms are stamped, you cannot receive credit for that session. The states allow no exceptions.

PLEASE NOTE:

Stamping your CE form when you shouldn't (when you haven't attended the entire session) is unethical and dishonest, and has no place in our industry. Please do not do it. Abuse of the rules negatively affects the reputation of the symposium, BYU, the Society of Financial Service Professionals, and sponsors and their relationships with the various state insurance departments. Abuse will result in a loss of CE approval from the states, and more stringent rules and procedures.

Not all workshops qualify for CE credit. Thursday's main platform is approved for CE credit; Friday's main platform is not approved for CE credit. The workshop schedule identifies the workshops that are approved for CIE credit. The schedule can be viewed on the symposium Web site at www.granttaggart.com. The schedule will also be in the printed program which you will receive at the symposium.

CE Credit for Insurance Licensees (CIE): Most sessions of the symposium have been approved for CE credit for insurance licensees by the insurance departments of *California, Idaho, Nevada, Oregon, Utah, Washington, and Wyoming*. Insurance licensees of these states may receive up to nine (9) hours of CIE credit during the two-day symposium.

Ethics CE Credit for Insurance Licensees: Three (3) one-hour workshops have been approved for Ethics CIE credit by *California, Idaho, Oregon, Utah, Washington, and Wyoming*. (Nevada does not have a separate Ethics CE requirement. However, Nevada licensees can attend the Ethics workshops and receive "regular" Nevada CE credit.) An insurance licensee may receive one, two, or three hours of Ethics CIE credit (as part of the total 9 hours of CIE credit available).

CFP-CE: CFP-CE credit has been requested, and up to 9 hours are anticipated for attending each hour of workshops and the Thursday main platform session. CFP-Ethics-CE credit is not available at the symposium.

PACE: Nine (9) hours of PACE credit is available to all designees subject to PACE requirements. PACE is not state-specific.

Questions: Questions about CE credit may be directed to Brian Petersen at brian.petersen@benfinancial.com or (801) 933-1220.

Nonlicensed Office Staff and Secretaries

In order to encourage attendance by nonlicensed office staff and secretaries, we offer a special \$30 rate to this group.

Cancellation/Refund Policy

Program participants may cancel at any time until Thursday, September 4, 2008, by 5:00 p.m. mountain time and receive a full refund less \$10. Cancellations occurring after this date may be refunded on a prorated basis. Please address your refund request to BYU Conferences and Workshops Refund Committee, 136 Harman Continuing Education Building, Provo, UT 84602. If you prefer, please e-mail your request to cw136@byu.edu.

Admission and Standards

Participants of any race, color, creed, and ethnic or national origin are accepted for admission to this program

provided they maintain the university standards while on campus. These include modesty in dress and conduct and abstinence from alcohol, tobacco, coffee, tea, and harmful drugs.

We are committed to providing a learning atmosphere that reasonably accommodates persons with disabilities who are otherwise qualified. We encourage applicants to contact Conferences and Workshops two weeks prior to the start of the conference. Applicants with disabilities are invited to discuss the program content and available facilities with the program administrator.

FERPA Policy

By an act of Congress, the Family Educational Rights and Privacy Act (FERPA) protects the privacy of your educational record. In order to be in compliance with FERPA, we require your Social Security number before releasing any personally identifiable or educational information to you. Please do not ask spouse, friends, or relatives to request this information for you.



General Information

Dates, Time, and Location

September 18 - 19, 2008

8:30 a.m. - 5:00 p.m.

Brigham Young University

Conference Center

Provo, Utah

Who may benefit from participating?

The Grant Taggart Symposium has educational sessions for professional and practice development in the life insurance and financial services industry. Classes and workshops are specifically provided for agents, managers, and staff.

Who sponsors the symposium?

The Grant Taggart Symposium is jointly sponsored by the Utah Chapter of the Society of Financial Services Professionals, the Utah Chapter of the National Association of Insurance and Financial Advisors, and Brigham Young University.

Symposium Location

The symposium is held each year on the campus of Brigham Young University in Provo, Utah. All sessions will be held at the BYU Conference Center, located just east of the Marriott Center.

Utah Valley Convention and Visitors Bureau

Travel Information: For tourist, dining, and other lodging information, please contact the Utah County Travel Council at (801) 851-2100 or visit <http://www.utahvalley.org>.

Food

The following food functions are included in the tuition fee: Thursday and Friday breaks and lunches.

Parking

On Thursday, participants are encouraged to park in the lot north of the Marriott Center. Parking is available without a permit in the BYU Conference Center west parking lot.

As a guest of BYU, and to help you enjoy your stay, please remember that disability stalls, dean and official stalls, service stalls, red curbs, etc., require special permits. Parking in any of these stalls without the proper permit will result in a parking citation. Please remember that timed stalls are enforced for the time posted.

Map of Campus

A map of campus is available at <http://map.byu.edu/campusmap.pdf>

Information about the [BYU Conference Center](#)

Page last modified: 08/26/2008 4:16 PM. [View Privacy Policy](#).



Lodging and Shuttles

Hotel Accommodations

Reserve your hotel rooms now! As a conference participant please make sure to mention that you are attending a BYU event and are therefore eligible to receive a special rate!

We recommend you check the following local hotels:

Provo Marriott Hotel

101 West 100 North
Provo, Utah 84601
(801) 377-4700
(800) 228-9290

Provo Super 8 Motel

1555 North Canyon Road
Provo Utah 84604
(801) 374-6020

Provo Marriott Courtyard

1600 North Freedom Blvd.
Provo, Utah 84604
(801) 373-2222
(800) 321-2211

Provo Best Western CottonTree Inn

2230 N University Pkwy
Provo, Utah 84604
(801) 373-7044

Residence Inn

252 West 2230 North
Provo, UT 84604
(801) 374-1000

Hampton Inn

1511 South 40 East
Provo, UT 84601

Shuttles / Airport-to-Hotel Transportation

EXPRESS Shuttle is available to transport you to and from the airport. The telephone number is 1-800-397-0773. (It is approximately a one-hour drive from the Salt Lake City International Airport to Provo.) We strongly encourage you to make shuttle reservations ahead of time to avoid waiting at the airport. If you choose to make arrangements upon arrival, the shuttle service counters are located near the baggage-claim area. Car rental is available at the Salt Lake City International Airport.

GRANT TAGGART SYMPOSIUM

TURN SUCCESS INTO SIGNIFICANCE TOGETHER

SEPTEMBER 18-19, 2008

Main Platform Speakers



Donald F. White, CLU, ChFC, AEP
Getting to the Top, and Staying There!

Donald White is CEO of Treasure Coast Financial, a multidiscipline financial services organization headquartered in Stuart, Florida. He is the author of two audio series entitled *Legacy Planning* and *Building a Great Business*. He is an accredited estate planner, as well as a 15-year qualifier of the exclusive MDRT Top of the Table, ranking him among the top 1,500 financial advisors internationally. A world-renowned communicator, Don has frequently spoken in North America, Asia, Europe, Australia, and the Caribbean.



Jeffrey J. Taggart, 2008-09 President, National Association of Insurance and Financial Advisors
What's happening in our Industry and in Washington?

Jeffrey J. Taggart, CLU, ChFC, LUTCF is a third generation NAIFA member continuing his family tradition of giving back to the insurance industry, following in his father's, uncle's and grandfather's footsteps. He is the first multi-generational president in NAIFA's history. His grandfather, Grant Taggart served as a NALU president in 1942-43. Jeff is a general agent with the UNIFI Companies emphasizing in the closely held business and estate planning markets writing life, health and disability insurance. He holds NASD series 6, 7 and 63.



Kendell R. Kennington
It Ain't Heavy. It's my Anchor.

Ken Kennington entered the life insurance business in 1985 and is an independent insurance agent in South Jordan, Utah. He is among the top producers of the companies he represents. Ken has spoken to, and trained, financial advisors all across the United States. In his practice, he writes hundreds of new cases each year. We are frequently taught the "hows" of selling insurance, the techniques of presenting and closing, and all of the other "stuff" that comes as part of the process. All too often we overlook the "whys". Ken's perspective reminds us why we do what we do.



Walton W. Rogers, 2008-09 President, Million Dollar Round Table
The Whole Person

Walton Rogers, of Annapolis, Maryland, is a 33-year MDRT member and a three-time Court of the Table qualifier. He has served as a member or chair of 25 MDRT committees and task forces in addition to being an active volunteer for the MDRT Foundation. A Platinum Knight-level donor to the foundation, he most recently served as vice president of the MDRT Foundation. He also has participated in several major activities of the MDRT Foundation, including Habitat for Humanity home-building projects. In the industry, he has served twice as president of the Annapolis Association of Insurance and Financial Advisors, and he is a 15-time recipient of Baltimore's Agency Leader Award.

**Mike and Joan Elder***In the Arms of Love*

Mike and Joan Elder live in Cache Valley, Utah and have raised 12 children. Along the way there has been much joy and some heavy heartache. Both have done their share of selling. He is an agent with Beneficial Financial Group, and Joan has a passion for food storage. She has sold and delivered over 250,000 pounds of wheat in the last two months. Together they have a family story to tell that will touch your heart and give new meaning to the definition of family preparedness.

Friday Morning Presenter

**Stephen R. Covey, Author and International Speaker***From Effectiveness to Greatness*

Dr. Stephen Covey has been named by *Time* magazine as one of the 25 most influential Americans. He is a recipient of the Man of Peace Award from the Sikh religion and received the Thomas More Medallion, as well as the Lifetime Entrepreneur of the Year Award and the National Father of the Year Award. His book, "The 8th Habit: From Effectiveness to Greatness" was chosen by Soundview as the best business book in 2005. Approximately 30 million copies of his books, printed in 28 languages, have been sold worldwide.



Main Platform Overview

Thursday, September 18th

Start Time: 8:30 a.m.

Title	Speaker
<i>Welcome & Opening Ceremonies</i>	J. R. Jones
<i>Getting to the Top and Staying There</i>	Donald White
<i>What's happening in Washington</i>	Jeffrey Taggart
<i>NAIFA Promotional</i>	Video
<i>It ain't heavy, It's my Anchor</i>	Ken Kennington
BREAK	
<i>Welcome by dean of Marriott School</i>	Gary Cornia
<i>The Whole Person</i>	Walton Rogers
<i>The Arms of Love</i>	Mike & Joan Elder

Friday, September 19th

Start Time: 8:30 a.m.

Title	Speaker
<i>From Effectiveness to Greatness (Part I)</i>	Stephen R. Covey
BREAK	
<i>From Effectiveness to Greatness (Part II)</i>	Stephen R. Covey



Video about Grant Taggart Symposium

Audio Files from the 2006 Conference

Mark Waite - [Ethics September 28, 2006 \(mp3\)](#)

Mark Waite - [Ethics September 29, 2006 \(mp3\)](#)



GRANT TAGGART SYMPO

TURN SUCCESS INTO SIGNIFICANCE TO

SEPTEMBER 18-19, 2008

Schedule

Thursday, September 18th

Start Time: 8:30 a.m.

Title	Speaker
<i>Welcome & Opening Ceremonies</i>	J. R. Jones
<i>Getting to the Top and Staying There</i>	Donald White
<i>What's happening in Washington</i>	Jeffrey Taggart
<i>NAIFA Promotional</i>	Video
<i>It ain't heavy, It's my Anchor</i>	Ken Kennington
BREAK	
<i>Welcome by dean of Marriott School</i>	Gary Cornia
<i>The Whole Person</i>	Walton Rogers
<i>The Arms of Love</i>	Mike & Joan Elder

Friday, September 19th

Start Time: 8:30 a.m.

Title	Speaker
<i>From Effectiveness to Greatness (Part I)</i>	Stephen R. Covey
BREAK	
<i>From Effectiveness to Greatness (Part II)</i>	Stephen R. Covey


2008 Grant Taggart Symposium Workshops					
Track:	Ethics	Life Insurance	Financial Planning	Health / Disability / LTC	Passion for the Business
Thursday Afternoon Workshops					
1:30	Quinn McKay Creating a Person of Integrity (Ethics CE credit)	Ken Kennington Are You Doing Business or Building Business? (No CE credit)	Walton Rogers Strategy Sharing for Newer Agents & Others (CE credit)	Ernest Sweat Tips, Tricks, & Trends of Employee Health Benefit Plans (CE credit)	Craig Wilson Achieving Lasting Meaning in Financial Services (No CE credit)
2:30 - 2:50	Exhibitor Break				
2:50	Kelly Bills How to Misrepresent an Annuity Sale (Ethics CE credit)	Scott Phillips Life Insurance in Estate Plans (CE credit)	Ken Evans What Every Security Rep Should Know (CE credit)	Doug Lenhoff Disability Income: Products, Pricing, & Placing	Jeff Erikson Passion and Productivity: Keys to a Spectacular Practice

				(CE credit)	(No CE credit)
3:50 - 4:10	Exhibitor Ice Cream Break				
4:10	Stephanie Curry Correlating Trust Assets Ethically (Ethics CE credit)	Donald White Conducting an Effective Interview (CE credit)	Mark Bradley Financial Pornography (CE credit)	Teresa Campama Long-Term Care Insurance: How to Navigate Underwriting (CE credit)	Jesse Sitterud Advocacy Planning and Tons of Referrals (CE credit)
Friday Afternoon Workshops					
1:00	Quinn McKay Creating a Person of Integrity (Ethics CE credit)	Donald White That's a Great Strategy!!! (CE credit)	Ken Evans What Every Security Rep Should Know (CE credit)	Doug Lenhoff Disability Income: Products, Pricing & Placing (CE credit)	Jesse Sitterud Advocacy Planning and Tons of Referrals (CE credit)
2:00 - 2:30	Prize Drawing and Exhibitor Break				
2:30	Kelly Bills How to Misrepresent an Annuity Sale (Ethics CE credit)	Walton Rogers Strategy Sharing for Newer Agents and Others (No CE credit)	Mark Bradley Financial Pornography (CE credit)	Ernest Sweat Tips, Tricks, and Trends of Employee Health Plans (CE credit)	Craig Wilson Achieving Lasting Meaning in Financial Services (No CE credit)
3:30 - 3:45	Exhibitor Brownie Break				
3:45	Stephanie Curry Correlating Trust Assets Ethically (Ethics CE credit)	Ken Kennington Are You Doing Business or Building Business? (No CE credit)	James Cardall To Fee or Not to Fee? (CE credit)	Teresa Campama Long-Term Care Insurance: How to Navigate Underwriting (CE credit)	Marv Reynolds Rekindle Your Passion for the Business (No CE credit)

For a printable version of the schedule, click [here](#).



2007 Audio Presentations

Presentation Title	Presenter	Audio
The Strength to Believe	Troy Evans	 MP3
Life Insurance Part 1	Dan Corrigan	 MP3
Managing Investment Expectations	Dan Corrigan	 MP3
The Elevator Speech & Strategic Breakthroughs	Scott Nugent and Brian Moran	 MP3
Secrets from MDRT & Why You Do What You Do	Dan Corrigan and Carrie Moore	 MP3
Marketing Best Practices Part 1	David Frey	 MP3
Marketing Best Practices Part 2	David Frey	 MP3