



## Northwest Planned Giving Roundtable

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4404 SE King Road, Milwaukie, OR 97222

### July Membership Meeting

**Date:** Friday, July 10, 2009

**Location:** University of Portland (Room location to follow)

**Time:** 3:30 – 5:00 Presentation  
5:00 – 6:00 Hosted Reception & Networking

**Cost:** NWPGR Member = FREE, WVDO, AFP member = \$15.00, Non-Member rate = \$25.00

**Payment options:** Check at the door or Visa or MasterCard pre-pay via phone 503-659-7365.

**Presented by:** **Carl V. Burnham III, CLU, ChFC, Partners Wealth Management**  
**Peter M. Mazonas, Life Settlement Financial, LLC**

#### Presentation Summary:

##### **The Life Settlement Marketplace – Current perspectives and why you should care.**

Approximately \$200 billion of life insurance policies, on the lives of seniors, lapse each year. That is about \$75 billion in value that could go to charitable causes or to fund senior care. Life insurance is a poorly understood asset. The disposition of unwanted and unneeded policies represents an opportunity for professionals to help both clients and charities. Learn more about this emerging secondary marketplace.

Carl Burnham is a Financial Advisor, executive benefit consultant and managing partner of the Portland office of Partners Wealth Management. His experience includes over 20 years at a national executive benefits consulting firm specializing in employee benefits, retirement and estate planning. Carl adds specialized knowledge and expertise to his team in designing and implementing various types of executive benefit programs for key employees and business owners.

Peter Mazonas is the CEO of Life Settlement Financial (LSF), a life settlement and viatical provider with corporate offices in San Francisco. LSF buys policies directly from policy owners and works with state health care associations, their member companies and estate planning professionals. LSF also provides contract underwriting to large wealth management and settlement funders. Peter is a Price Waterhouse trained CPA and the creator of the Financial Counseling and Private Banking Divisions of Bank of America. Peter later created Transamerica HomeFirst, the largest originator and servicer of non HUD/Fannie Mae reverse mortgages in America. Peter is a frequent speaker at CPA Society and Bar Association Conferences.

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If you have questions about any of the 2009 programs or ideas for future programming, please contact Julie Eubanks, 2009/10 Program Chair, at (503) 216-2198 or [julie.eubanks@providence.org](mailto:julie.eubanks@providence.org)

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