

PRESENTER SHEET

Description	To educate attendees on the 831(b) Tax Code and how they can fortify their business risk with tax-deferred funds. This strategy, used by every fortune 500 company, is now accessible to SMBs. Learn how to leverage this tool for your business and protect what you work so hard to build.		
Presenter	Van Carlson, Ed Bryan, or Clay Ogden		
Level of presentation	<input checked="" type="checkbox"/> Basic	<input type="checkbox"/> Intermediate	<input type="checkbox"/> Advanced
Learning objectives:	<ol style="list-style-type: none"> What is the 831(b) Tax Code? <ul style="list-style-type: none"> 401k similarities Benefits <ul style="list-style-type: none"> Primary: Risk mitigation Secondary: Tax deferred Real world examples The importance of compliance <ul style="list-style-type: none"> Choosing the right captive manager How to leverage an 831(b) Plan for your business Strategies within your 831(b) plan 		
General subject areas:	<p><i>Who:</i> This session is for entrepreneurs looking to protect their success</p> <p><i>What:</i> The Entrepreneuers Secret Weapon: 831(b) Plans</p> <p><i>Keywords:</i> captives, microcaptives, 831(b) Plans, risk mitigation, tax-deferral, insurance, next-level strategies</p>		

VAN CARLSON

As Founder & CEO of SRA 831(b), Van is an innovator, developing products for a variety of industries that can take advantage of adding additional revenues while mitigating risk at the same time. By delivering institutional-type ideas to small-and-mid-sized business owners, SRA positions its clients at the forefront of their industry, allowing them to weather any storm.



Van Carlson has an extensive background in Risk Management with more than 24 years in the industry. Prior to founding SRA, Van ran his own property and casualty firm for 15 years. With many commercial business owners as his clients, he saw the Great Recession of 2008 hit hard, and just like them, he was also affected by the sharp downturn in our economy. During this time, he realized there must be a better way to manage risk overall. From that desire to improve business operations for both himself and his clients, along with his extensive background in insurance, risk management, and finance, SRA was formed.

Since its start in 2008, several changes in US Government regulations have allowed the business to thrive – substantiating what Van already believed in: businesses needed a better solution to mitigate risk and create a war chest for the future. In 2013, increases in domiciles allowed the company's success to skyrocket – with double-digit growth year over year.



ED BRYAN

Ed has more than 20 years of sales and operations management experience with a consistent history of leading high-performing sales teams and operational excellence. As Director of Business Development, Ed leads the SRA team in partnering with clients and valued advisors to provide next-level strategies to business owners. He has been a featured speaker at numerous well-known national conventions and industry events in insurance, finance, and long-term planning.

CLAY OGDEN

Clay could easily be described as the ace of the SRA Team. In his role as National Business Development Manager, Clay does it all as he interacts with business owners and advisors to identify risk management strategies. As a former professional Golfer on the Nationwide, Web.com, Canadian and mini-tours, Clay nurtures many of his business relationships on the course and brings more than 12 years in risk mitigation to identify opportunities and consult with clients and representatives.

