

AIG Advisor Group  
2008 Asset Management Conference  
Pointe Hilton Squaw Peak, Phoenix Arizona  
November 5 – 7, 2008

### **Key Talking Points**

- Nearly 150 financial planners, who operate their own independent businesses and are not AIG employees, participated in the event. Financial planners who attended the meeting represent 23% of total AIG Advisor Group revenue as of September 30, 2008.
- The purpose of the Asset Management Conference is to ensure that independent financial planners receive the knowledge, skills, and training required to meet the evolving needs of their clients. This meeting was designed to introduce new investment products and technology tools that support the growth of an advisor's business.
- AIG Advisor Group takes very seriously their commitment to aggressively manage meeting costs in the current environment. Their success in enlisting product sponsors to pay for the vast majority of conference expenses, while charging financial planners a registration fee and for their travel expenses, resulted in minimal cost to AIG.
- Eighteen participating product sponsor firms underwrote \$320,000 of the total meeting cost of \$343,000. The company's portion of the total meeting costs was less than \$25,000. Additionally, financial planner attendees were responsible for their travel-related expenses, registration fee (\$199), and guest registration fee (\$250).
- AMC attendees were eligible to fulfill Continuing Education (CE) credits required to earn industry designations and certifications. These include 9.5 hours of CE credits toward Certified Financial Planner® (CFP) certification, and 9.0 hours of CE credits toward three Investment Management Consultants Association (IMCA) designations.

### **Supplemental Talking Points**

- AIG Advisor Group has conducted a top-to-bottom review of all AMC meeting expenses to validate that only expenses required to ensure the meeting's success are incurred.

- Consistent with that review, the company determined that the appearance of Terry Bradshaw as a guest speaker was not required. Although costs related to his appearance were to be paid by a product sponsor, his appearance was cancelled.
- The decision to eliminate signage from the event reflects the desire to minimize cost and to avoid even the appearance of spending money unnecessarily. AIG Advisor Group also did not want to distract from their product sponsors who are responsible for underwriting the majority of the meeting's costs.