



## Michael Fugler Speaks and Participates in Panel at FSX, San Francisco

Perdido Key, FL / [PRBuzz](#) / May 16, 2011 - - Michael Fugler completed a successful speech at The Financial Services Exchange (FSX) conference in San Francisco, and moderated an Educational Panel on THE LIFE SETTLEMENT (LS) INDUSTRY.

THE LIFE SETTLEMENT (LS) INDUSTRY BY MICHAEL FUGLER:

THE PAST-THE PRESENT-THE FUTURE-

HOW TO FIND THE OPPORTUNITY FOR YOUR CLIENTS:

Understanding of the LS Industry, its development and the early regulatory and media negativity

2008 VBT tables - concept, meaning and impact on the industry

Life Settlements investment risk

How to invest with confidence in Life Settlements

The Life Settlement industry has witnessed a great deal of innovation recently but also a lot of regulatory challenges and negative press. This asset class requires high levels of sophistication and education among investors, and is usually both a long-term investment and an illiquid one. In the midst of these negatives, many Life Settlement funds have experienced difficulties in communicating the extensive benefits of the asset class to new and wary investors, especially accredited investors.

Investing in Life Settlements is complicated, with a number of critical risks that not only need to be disclosed but understood by the investor in order to make an informed investment decision. This presentation, by Michael Fugler, Deputy Chairman of ELSA (The European Life Settlement Association), provided financial advisors with the information they need to professionally evaluate Life Settlement investments. This was an invaluable presentation for those exploring how to invest in Life Settlements with confidence!

PANEL: OFFERING INSIGHTS INTO LIFE SETTLEMENTS AND ISSUES TO CONSIDER BEFORE INVESTING

Due diligence, valuation and pricing

Finding trustworthy advisors and service providers

Exploring global uses of Life Settlements

Regulatory environment: insurance & securities

Understanding why investor education is critical

Life Settlements as an asset class were performing well compared with the rest of the marketplace pre-recession. Now that the dust has settled and many investors are seeking uncorrelated investments as part of their de-risking strategies, the Life Settlement marketplace stands to capitalize... but they will also face strong competition for fresh capital as well as newly demanding due diligence procedures.

How can LS funds distinguish themselves in the new environment?

What fund structures will prove to be the most successful?

FSX presented a dynamic panel that explored:

The components of Life Settlements

Parties: policy holder, agent, broker, provider

Parties that aid the transaction: LE provider, asset servicer, law firm, financing entity

Risks: longevity, origination, currency

Creating reliably-performing Life Settlement portfolios

Risk-reward profile of LSs and their suitability

Regulations

Presenter/Moderator Michael Fugler, Deputy Chairman, European Life Settlement Association (ELSA)

Panelists: David Tepper, Neuma

Matthew Paine, GWG Life

Steven Shapiro, Q Life Fund

Paul Siegert, Co-Founder and Principal, GWG Life, & President and CEO, The Insurance Studies Institute

Michael Fugler, Investment Banker, Attorney at Law [www.michaelfugler.com](http://www.michaelfugler.com)

Deputy Chairman, Member Education Committee and Regulatory Committee, European Life Settlement Association (ELSA) [www.elsa-sls.org](http://www.elsa-sls.org)

Chairman, EURO Financial Network, Inc. [www.eurofinancialnetwork.com](http://www.eurofinancialnetwork.com)

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Chairman, Real Estate Investment Securities Association (REISA) Marketing Committee and Member REISA Conference Planning Committee <http://reisa.org/>

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Chairman, Past Chairmen's Committee, National Investment Banking Association (NIBA) [www.nibanet.org](http://www.nibanet.org)

Mr. Fugler is a global expert and speaker on Longevity and Life Settlements. He manages the strategic vision and direction for building Welcome Life as the global expert in longevity markets, offering institutional clients with trading, product development, capital raising and independent objective advice. Mr. Fugler was a key member of the team that led Welcome Life Securities to become the first Broker Dealer to operate exclusively in life settlements.

Mr. Fugler has been a licensed Attorney for 38 years developing an expertise in international law and finance, international investment and merchant banking. He has

also been an Investment Banker for the past 16 of those years being FINRA registered with Series 7, 24, 63 and 79 licenses and establishing offices and providing extensive consulting and guidance to institutional investors throughout Europe and the USA.

Financial Services Exchange (FSX) [www.fsxone.com](http://www.fsxone.com)

FSX is the premier investment conference organization in the United States. Founded in 1983, they are a national organization comprised of independent FINRA broker/dealer firms. Through a series of regularly scheduled conferences, FSX brings these firms together with the purpose of sharing information and showcasing investment opportunities. The organization has hosted consecutive quarterly conferences for more than 25 years. FSX is one of the most reputable and established national alliances in the country for independent broker/dealers and their firms. FSX has a nationwide network of independent broker/dealers and sponsor organizations. Its member firms have a combined sales force of thousands of licensed professionals with clients who may want to invest in your company. To date, more than \$2.8 billion has been raised for presenting companies through the FSX network.

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