

Since 2003, Ashar has been an influential member of the secondary market serving as an advocate for best practices and transparency. We collaborate with members of the insurance, financial services, estate planning, business planning, legal, and trust communities.

SPEAKING ENGAGEMENTS

2024 | South Dakota Trust Association – Life Settlements: Ethical and Professional Responsibility

2024 | Walters Institute – Life Settlements and Life Insurance Valuations

2024 | Advanced Planning Educational Group, Inc. (APEG) – Maximize Life Insurance Value - Ethical and Professional Responsibility

2024 | University of Florida Advisory Network (UFAN) – An Innovative Approach to Gifts of Life Insurance

2024 | Financial Premium Finance Symposium – Life Settlements and Life Insurance Valuations

2024 | CPE Presentation – Life Settlement and Life Insurance Valuation Solutions for Estate & Tax Professionals

2024 | NAEPC National Webinar – Essential Insights: Avoiding Discounted Life Settlement Offers

2024 | American Cancer Society – Maximize the Value of Life Insurance – An Innovative Approach to Charitable Giving

2024 | Private Wealth Group – Insurance Valuation in Estate and Gift Planning

2024 | Bank of America Wealth Strategies Round Table

2024 | NAEPC National Webinar – Life Insurance Valuations Support Client Conversations

2024 | NAEPC National Webinar – Key Takeaways from NAEPC 2023

2024 | Charitable Presentation for Carroll Hospital Foundation

2024 | Estate Planning Council Meetings – NY, MA, FL, VA, AL, KY, TN, WI

2023 | National Association of Estate Planners & Councils (NAEPC) – Unique Planning Solutions Utilizing Existing Life Insurance Policies (consecutive main stage presentations from 2016 – present)

2023 | AICPA Engage – Maximizing the Value of Existing Life Insurance, How to Answer Client Questions (multiple presentations since 2018)

2023 | Notre Dame Tax & Estate Planning Institute – When to Value Life Insurance in Business and Estate Planning

2023 | Estate Planning Council Meetings – PA, MI, MD, MS, AZ, AK, TX, NJ

2022 | ACTEC Tax and Estate Planning Conference – Fund Today's Planning Using Existing Life Insurance

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- 2022 | Montana Tax Institute – Leverage the Fair Market Value of Existing Life Insurance Assets
 - 2022 | Florida Bankers Association – Life Settlement Legal and Ethical Responsibility
 - 2022 | Advisor Nation – Leverage the Fair Market Value of Existing Life Insurance Assets
 - 2022 | Business Enterprise Institute (BEI) – Sell Existing Life Insurance to Fund Retirement Post-Exit
 - 2022 | Planned Giving Webinar for Houston Jewish Community Foundation
 - 2022 | Wealth Management & Trust, Bank Directors Conference – Life Settlement Legal and Ethical Responsibility
 - 2022 | Forum 400 – Maximizing Life Settlement Value to Clients
 - 2022 | American Associate for Cancer Research (AACR) – An Innovative Approach to Gifts of Life Insurance
 - 2021 | Heckerling Institute on Estate Planning – Q&A with Larry Brody
 - 2021 | Shenkman Law Webinar – Life Insurance Planning in the Current Environment featuring Martin Shenkman, Esq., Dick Weber, Melissa Seyum, Schiff Hardin LLP, Jon B. Mendelsohn
 - 2021 | M Financial Group – Policy Valuation Symposium
 - 2021 | Lourie-Todorovich Conference – Life Settlements Market Overview
 - 2019 | Chesapeake Planned Giving Council – An Innovative Approach to Gifts of Life Insurance
 - 2019 | European Life Settlement Association – Latest Insights in the Life Settlement Market
 - 2018 | Planned Giving Council of Upstate NY – An Innovative Approach to Gifts of Life Insurance
 - 2016 | Advisors in Philanthropy – Monetization and Valuation Issues for Life Insurance in Philanthropy

ACADEMIC AND EDUCATIONAL RECOGNITION | INDUSTRY EDUCATION

- 2024 | University of Florida Advisory Network Conference
- 2024 | Texas Tech Estate Planning Class
- 2024 | Yale Study Group
- 2021 | Harvard Business School – Family Office Wealth Management
- 2021 | Rice University MBA Program – Ashar Group Life Settlement Case Study

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- 2020 | Harvard Business School – Building a Legacy: Family Office Wealth Management
- 2018 | Harvard Business School – Case Study: Brokers and Co-opetition in the Life Settlement Industry
- 2018 | Columbia University – Columbia Business School: Liquidity and Longevity – Bequest Adjustments Through the Life Settlement Market, Kunal Sachdeva, February 19, 2018
- 2017 | The American College – RICP Retirement Income Certification Program – Video Series

NOTABLE PUBLICATIONS

- 2024 | Trust & Estates Magazine, Jon B. Mendelsohn, “FINRA Bulletin Uncovers Blind Spots About Life Settlements”
- 2024 | Wealth Management.com, William J. Clark, “Life Insurance Lapses Expected to Increase in 2024, Creating Opportunities for Investments
- 2023 | Wealth Management – 2023 Mid-Year Outlook, Jason T. Mendelsohn, “In a Reg BI World, Comprehensive Planners are Pushing Back
- 2023 | NAEPC Quarterly Journal, Jamie L. Mendelsohn, “Maximizing Life Settlement Value Through a Policy Auction”
- 2022 | Trust & Estates Magazine, Jon B. Mendelsohn and Todd Steinberg, “The Role of Life Settlements in Estate Planning”
- 2020 | Trust & Estates Magazine, Jon B. Mendelsohn, “Life Insurance Triage Tips for Fiduciaries”
- 2019 | Tax Adviser, Jason T. Mendelsohn, “Spotlight on Life Settlement Transactions: Getting the Best Value”
- 2018 | Trust & Estates Magazine, Jon B. Mendelsohn, “Tax Reform Drives New Discussions About Life Settlements”
- 2017 | Trust & Estates Magazine, Jamie L. Mendelsohn and Keith Buck, “Are Your Senior Client’s Estate Liquidity Plans About to be Trumped?”
- 2017 | Society of Financial Service Professionals, Jamie L. Mendelsohn, “Longevity Throws a Wild Card in Even the Best-Laid Plans”
- 2016 | Trust & Estates Magazine, Jon B. Mendelsohn, “Rethinking Life Insurance Valuation for Seniors”
- 2016 | Orlando Business Journal, Jon B. Mendelsohn, “A Life Settlement Can Take the Financial Sting Out of Aging”
- 2015 | White Paper, James W. Maxson and Jon B. Mendelsohn, “Life Settlement Proceeds Tax Treatment for Sellers”

MEMBERSHIPS | ANNUAL CONFERENCES | ADDITIONAL SPEAKING ENGAGEMENTS

NAEPC – National Association of Estate Planners & Councils

Heckerling Institute on Estate Planning

ACTEC – American College of Trust and Estate Counsels

AICPA – American Institute of CPAs (multiple presentations from 2015-present)

Finseca Advanced Markets – formerly AALU (multiple presentations from 2011-present)

LAMP – Leaders & Managers Program

Forum 400 – Elite, Invitation Only, Advanced Planners (multiple presentations from 2008-present)

SFSP – Society of Financial Services Professionals (multiple presentations from 2006-present)

NAILBA – National Association of Independent Life Brokerage Agencies

AIP – Advisors in Philanthropy

LIMRA – Advanced Sales Forum

WIFS – Women in Financial Services

FFR – Frist Financial Resources

FSI – Financial Services Institute

ATO – Association of Trust Organizations

Hawaii Tax Institute

COMPANY CAUSES

Crohn's & Colitis Foundation

SupermanHPV

RESOURCES

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