

# *Concepts of the Asset Management Model*

## *Agenda*



### *Discussion of the Asset Management Model*

- Why are we Changing?
- Defining the Concept of Asset Management Model



### *Who is required to Convert to the Asset Management Model?*

- Discussion of the 250 Unit Limit
- Discussion of the Stop-Loss Option



### *Discussion of Management Fees/Asset Management Fees*



### *What are the Required Due Dates for the Conversion?*

- AMP Number Assignment Discussion
- The Actual Conversion Due Date



### *Reference Materials*