



LIFE
SETTLEMENTS

POLICY
VALUATIONS



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ashargroup.com

def: (ash-er)
“do what is right
and you will be
blessed”



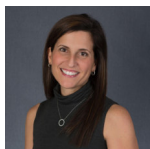
Jamie L. Mendelsohn
Executive Vice President

Jamie L. Mendelsohn is a thought leader in the secondary market for life insurance and partners with the nations’ leading wealth management firms, attorneys, CPAs, trust officers, and financial professionals. Jamie is instrumental in the development of an innovative market-based policy valuation of fair market value, the Ashar Secondary Market Valuation (SMV®).

For more than a decade, Jamie has earned the reputation as a determined client advocate in the life settlement market. Jamie is the go-to independent resource for advanced planners and fiduciaries nationwide who integrate the SMV® into their holistic planning process and select her to negotiate for their client if the decision is made to sell the policy. She has spoken at numerous financial services conferences and provides continuing education for both financial and insurance professionals nationwide.

Jamie earned her bachelor’s and master’s degrees from the University of Florida, where she was a member of the Alpha Delta Pi sorority. She is proud to be a member of Women in Insurance and Financial Services and dedicates much of her time and energy to the local and national Crohn’s and Colitis Foundation, where she serves as the President of the Central FL/North FL Chapter. She serves the community by speaking at education events, and mentoring patients and their families. Jamie resides in Orlando, FL. She enjoys reading, traveling, and spending time with her family and friends.





Jamie L. Mendelsohn
Executive Vice President
Ashar Group and Ashar SMV



Since joining Ashar Group in 2007, Jamie has been responsible for national partnerships, including the nation's leading life insurance carriers, and collaborating with members of the insurance, financial services, estate planning, business planning, and legal communities. She speaks nationally about life settlements, policy valuations, and increased longevity among seniors.

EDUCATION

Bachelor of Science | University of Florida

Masters of Science | University of Florida

CONFERENCE SPEAKING ENGAGEMENTS

2019 | AICPA Advanced Personal Financial Planning – Life Settlement and Policy Valuation Best Practices Impacting Planners

2018 | National Association of Estate Planning Council – Collaborative Planning Opportunities Created Policy Valuations

2018 | Life Insurance and Market Research Association

2018 | AICPA Advanced Personal Financial Planning – Longevity Changes Everything

2017 | National Association of Estate Planning Council – Advanced Planning Applications for Market-Based Life Insurance Valuations

ACADEMIC AND EDUCATIONAL RECOGNITION | INDUSTRY EDUCATION

2018 | Texas Tech: Viatical and Life Settlements

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

ADDITIONAL SPEAKING ENGAGEMENTS

Podcast – Entrepreneur Perspectives of a Life Settlement Specialist with Jamie Mendelsohn

Estate Planning Councils Nationally

AALU – Association for Advanced Life Underwriting (multiple presentations from 2011-present)

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

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

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

NOTABLE PUBLICATIONS

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”

MEMBERSHIPS AND ANNUAL CONFERENCES

WIFS – Women in Financial Services

NAEPC – National Association of Estate Planners & Councils

ACTEC – American College of Trust and Estate Counsels

AALU – Association for Advanced Life Underwriting

AICPA – American Institute of CPAs

Forum 400 – Elite, Invitation Only, Advanced Planners

SFSP – Society of Financial Services Professionals

Heckerling Institute on Estate Planning

NAILBA – National Association of Independent Life Brokerage Agencies

AIP – Advisors in Philanthropy

LIMRA – Advanced Sales Forum

COMPANY CAUSE

Crohn’s & Colitis Foundation – Board Member

CONTINUING EDUCATION TRAINING