

Pacific Life Insurance Company

The Anatomy of a Recession: What to Look for and Where We're Headed in the U.S. Economy

Program Description:

The Anatomy of a Recession program is designed to deliver thoughtful perspective on the state of the United States economy with concise, practical views that are updated quarterly. The foundation of the program are the ClearBridge Investments proprietary Recession Risk and Recession Recovery dashboards that focus on two unique set of economic indicators. The Recession Risk Dashboard looks at the chances of a recession happening over the next 6-18 months. It looks at 12 indicators that are categorized into three key segments: consumer, business activity and financial. The Recovery Dashboard is designed to complement the Recession Risk dashboard. Rather than focusing on the chance of a recession occurring, the Recovery Dashboard looks to estimate when the conditions for the end of a recession may be forming. This dashboard is looking at 9 individual indicators that fall into three key areas: confidence, economic and financial. The dashboards are updated and published monthly along with an overall signal that speaks to the state of the US economy in terms of expansion, caution, or recession. The quarterly presentation provides insight on the economy's current health and outlook leveraging the dashboards and supporting data and analysis.

Learning Objectives:

- To help financial professionals understand the many dynamics of the United States economy with consistent quarterly analysis and insight.
- To provide a simple dashboard tool the advisor can utilize to comprehend sophisticated economic data that can seem overwhelming and disconnected.
- To elevate the knowledge and expertise of the financial professional on the critical drivers of the United States economy, so that they can communicate effectively to clients, addressing concerns and supporting decisions.

Registration Information: Pre-registration is not required for this event.

Delivery Method: Group-Live

Credit: This course is recommended for 1.0 CPE Credit

Field of Study: Specialized Knowledge

Program Level: Basic

Prerequisites: None

Who Should Attend: Financial Advisors, Insurance Agents, CPAs

Advance Preparation: None

For training purposes only. Not for use with the public or in conjunction with the sale of a life insurance product.

Refunds and Cancellations: Pacific Life Insurance Company typically offers the CE programs at no charge. In the event that a free program is cancelled, no refund is made. Should there be a fee associated with a cancelled Pacific Life Insurance Company program; the fee will be refunded in full. For more information regarding refund, concerns, and/or program cancellation policies, please contact Nadine Levin at 949-420-7134.

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