NAIFA Brilliant '09

NAIFA Convention & Career Conference '09

Orlando World Center Marriott Resort • September 12 - 16

ADVOCACY • PROFESSIONAL DEVELOPMENT • NETWORKING

CONVENTION WORKSHOP SUMMARIES

Managers/GAMA Members
Sunday, September 13
2:30 pm - 3:45 pm
Rick Funke
Competing for Sales Talent in a New World
Description:
Today's competitive business environment requires more than ever that you equip yourself with the latest and most effective ways to find the best sales talent for your organization. In this session, you will gain current, cutting-edge information and techniques that will increase the effectiveness of your recruiting program. LIMRA will present up-to-date research findings on recruiting trends in the financial services industry – as well as best practices on how to connect with candidates from different generations.

Managers/GAMA Members
Sunday, September 13
4:00 pm - 5:15 pm
Todd Benton
Developing Advisor Accountability
Description:
As a general agent or manager, your financial success is intimately linked with the level of success your advisors have in managing their commitments – to their production in acquiring new clients and to their service in retaining those clients. Yet, in today's 'crazy busy' culture – with round-the-clock" instantaneous media, computers, and high tech devices causing endless distractions which diminish focus and reduce effectiveness – how do you support your advisors to have the self-management practices that enable them to reliably fulfill those commitments that matter most? This 75-minute session (60 minutes presentation, 15 minutes Q&A) will provide pragmatic, hands-on practices that you can use to support your advisors to immediately improve their focus and their results.

Life Insurance & Annuities
Sunday, September 13
2:30 pm - 3:45 pm
Don Blanton
Life Insurance from a Wants Perspective (CE Available)
Description:
Life insurance is most often considered a "need" product. A "needs" discussion would suggest you could possibly have too much. We are going to look at Life Insurance from a "wants" perspective. Would it change your career if your clients "wanted" to buy all the life insurance your carrier would sell? Would it change your career if your clients "wanted" to put in the maximum

premium allowable by the federal government? Life insurance is the only product that will guarantee that what you want to happen will happen, no other product will do that. People move in the direction of the "wants" not their "needs". We know what people think about life insurance. You have one chance when you are with them to change what they believe to be true. If what you thought to be true turned out not to be true, when would you want to know? Don't miss this presentation!

Life Insurance & Annuities
Monday, September 14
7:30 am - 8:45 am
Michael T. Smith, LUTCF
Policy Review – Doing it Right and Opening Opportunities (CE Available)
Description:
Perhaps your clients or potential clients have had their investment portfolio reviewed during the tough economic times of the past couple years. But have they had their life insurance reviewed? Life insurance is also an important asset in anyone's portfolio and now is a great time to offer your expertise in conducting a quality policy review. During this lively session, you will learn how to provide a proper policy review, how to approach clients and potential clients, develop solutions that make it easy to understand, and close more sales. Using just an annual statement, you will also learn how to instantly determine if an existing policy is in financial trouble.

Life Insurance & Annuities
Tuesday, September 15
7:30 am – 8:45 am
David B. Malkin, CLU, ChFC
Attracting Qualified Prospects Through Strategic Alliances
Description:
This Top of the Table producer will share with you how he creates strategic alliances with firms that not only provide him with referrals but invite their clients to their own conference room so David can conduct seminars that create all types of opportunities; he will share with you one of the actual seminars he conducts that results in better than 50% of those attending retaining him to do their planning. He will also discuss the care & feeding of alliance partners.

Life Insurance & Annuities
Tuesday, September 15
12:45 pm - 2:00 pm
R. Jan Pinney, CLU, ChFC, CPCU
EZ Life Sales – 7 EZ Steps to Guarantee You Qualify for MDRT's Top of the Table Every Year
Description:
The presentation begins with the 8 reasons less than 5% of Insurance Advisors ever qualify for MDRT to begin with and why only 5% of MDRT qualifiers ever qualify for Top of the Table. One of the 7 steps is to BE REFERABLE and I will cover the 4 things you absolutely must do to always be referable that most advisors fail to do. I will cover the importance of listening more than talking and provide an in depth overview of the importance of concept selling rather than product selling. Finally I will share several concepts that anyone can implement to generate a quantum increase in their productivity leading them to perennial Top of the Table qualification.

Life Insurance & Annuities
Tuesday, September 15
2:15 pm – 3:30 pm
Thomas D. Hegna, CLU, ChFC
Retirement Solutions that Last a Lifetime (CE Available)
Description:
This morning's seminar will provide new industry research, best practices and community tools designed to help you help Baby Boomers take action to better prepare for retirement—even in these tough economic times.

Life Insurance & Annuities
Tuesday, September 15
3:45 pm - 5:00 pm
Julian H. Good, Jr., CLU, ChFC, CLTC
H. Larry Fortenberry, CPA, CLU, ChFC
Increase Sales by Reviewing the Individual Federal Income Tax Return
Description:
The U.S. Individual Federal Income Tax return is a treasure trove of sales ideas. This session examines individual tax returns, line by line, and covers a lode of concepts that can be put into practice immediately. Use these ideas to help your clients and prospects solve many of their financial and insurance problems.

Multiline
Sunday, September 13
4:00 pm - 5:15 pm
John C. Johns, LUTCF
Working Smart - Increasing Your Productivity and Your Bottom Line
Description:
The purpose of this workshop is to expose some common “time pirates” encountered in the multi-line sales environment and to offer some time proven methods to deal with them.
In this workshop we will look at: how to deal with interruptions, prioritizing tasks each day, planning and scheduling, and procrastination. We will look at how to work smart using 4D Decision making, the productivity formula, distinguishing between urgent and important, using technology to plan and schedule, managing “To Do” lists, and conquering procrastination.

Multiline
Monday, September 14
7:30 am - 8:45 am
McGregor Badillo
Growing Your Multiline Practice
Description:
This workshop will focus on what I call the 5 Critical Components to building, sustaining and growing a multi-line practice: Revenue Systems, Marketing Systems, Presentation Systems, Retention Systems and Office Systems. This is typically a three to four day workshop but I will be covering the highlights of each system in order to meet the 90 minute time frame.
Revenue Systems – understanding your revenue stream and expense ratios;
Marketing Systems – branding yourself and creating processes that generate leads;
Sales Systems – turn-key systems to help you convert leads into clients;
Retention Systems – strategies to help you keep what you earned and grow organically;
Office Systems – solving the people puzzle.

Multiline
Tuesday, September 15
12:45 pm - 2:00 pm
Kurt Kushner
Profitability and Loyalty, Multiline Style
Description:
Adding or expanding existing financial services to a property and casualty insurance agency can turn customers into clients. Kurt Kushner, Nationwide Financial Network's Director of Sales in eastern Pennsylvania, explores the why, the who and the how of a successful cross-sell campaign. Specifically, Kurt will explore why multi-lining is essential for P&C agency growth and stability, who to engage as essential sales partners for both transactional and consultative sales success, and how to implement strategies that are likely to increase agency revenue and loyalty.

Multiline
Tuesday, September 15
2:15 pm - 3:30 pm

Amy Floyd
What's Hot, What's Not, and What Can Keep You Out of Trouble (CE Available)
Description:
This presentation is designed to provide you with information on current developments in personal lines of insurance. Credit scoring, telematics and driving while texting are three areas generating industry and legislative interest. Insolvency issues surrounding insurance companies directly impact your ability to grow your business in these turbulent economic times. Learn about what's hot, what's not and what can get you in trouble.

Health & Employee Benefits
Tuesday, September 15
7:30 am – 8:45 am
Margie Barrie, LTCP, CSA
From the Best of the Best – Selling Tips to Boost Your LTC Insurance Sales
Description:
Long Term Care insurance is definitely a hot product. If you target baby boomers or seniors, you should not miss this workshop. Selling this product will become easier if you use the practical tips provided during this session. Learn from the best in the industry as Margie Barrie, "LTCI Insider Columnist" for Senior Market Advisor Magazine and book author, shares what she and other industry experts are doing to convince prospects of the need for this product and to make the sale. Topics discussed in this session include how to transition to the LTC sale when cross-selling, great power phrases to incorporate in the LTC discussion, key questions to get the client talking about this need, how to successfully ask for the sale and more.

Health & Employee Benefits
Tuesday, September 15
2:15 pm - 3:30 pm
David A. Bryant, JD
Disability Insurance - How to Help Your Clients Avoid Litigation (CE Available)
Description:
This program will provide advice for agents to assist insureds when filing a claim for disability insurance coverage and will highlight the benefits of individual coverage versus group long term disability coverage.

Health & Employee Benefits
Tuesday, September 15
3:45 pm - 5:00 pm
Roy Ramthun
Exploring the Role of Consumer-Driven Health Plans in Health Reform
Description:
In this workshop, we will discuss the current status of Congressional legislation to reform the health care industry in the U.S. and the role that consumer-driven health plans might play under a new financing and delivery system.

Financial Advising & Investments
Sunday, September 13
2:30 pm - 3:45 pm
Robin C. Mueller, LUTCF (CE Available)
Social Security, Retirement & Taxation
Description:
This course is fast paced covering two of the most talked about areas of Social Security. The attendee will walk away with a clear understanding of Social Security, retirement benefits and taxes.

Financial Advising & Investments
Monday, September 14
7:30 am - 8:45 am
Arun Sardana
Insights on Current Financial Market Conditions
Description:
The current financial turmoil is creating many challenges and opportunities. The economic environment today has been compared with the Great Depression and other similar distressed periods that were marked by fear, anxiety, and uncertainty. While no one has all the answers and it is difficult to predict how long this challenging environment may continue, the presentation will provide insights on how UBS Wealth Management Research views the current situation. The discussion will focus on emerging trends and observations on equity, fixed income, credit, and commodities markets. There will be an opportunity to engage in a vigorous dialogue during and after the presentation.

Financial Advising & Investments
Tuesday, September 15
7:30 am - 8:45 am
Vincent Micciche, CRCP
This Dosen't Look Like Kansas Toto – Risks and Opportunities in the New World Order
Description:
This session will give the attendee an up-to-date review of current trends in litigation and regulatory developments effecting financial service professionals and their customers. It will also examine the changing behavior of financial institutions regarding their sales force and customers. While focusing on practice management, the presenter will provide a frank assessment of the increasingly hostile environment that has developed in the financial services industry of late. In addition to assessing litigation and regulatory risk this session will discuss the implications of the massive consolidation that has occurred within the industry in the last two years. Finally, this session will look at ways of positioning yourself to profit from what may be historic opportunities.

Financial Advising & Investments
Tuesday, September 15
12:45 pm - 2:00 pm
Steven L. Welton, CLU, ChFC
Optimizing the Retirement Income Process
Description:
This workshop covers the most current trends in retirement income planning. This includes how the most successful advisors are preparing their practices and updating their skills and competencies for this large market opportunity. A disciplined, advice-based planning process with supporting tools and methodology is key to success in this market. This approach is discussed along with how product solutions are developed. The most current trends in product solutions are discussed, including the role of life insurance. You will take away several key strategies for success.

Practice Management
Sunday, September 13
4:00 pm – 5:15 pm
NAIFA Member Benefits Team
NAIFA Member Benefits Workshop
In this lively, interactive session you will learn about the latest additions to the NAIFA Professional Development System and where to access them on the NAIFA website. Whether its new online training programs; sales, marketing and prospecting tools; or discounts on valued business services, don't miss this opportunity to familiarize yourself with all the best that NAIFA has to offer to help you learn more to earn more!

Practice Management
Monday, September 14
7:30 am - 8:45 am
Norm Trainor
Succession Planning
Description:
The Covenant Group's presentation on Succession Planning starts by demonstrating that Succession Planning and Transition Planning are not the same. Norm Trainor distinguishes between advisors who are Players, Producers and those who are merely Pretenders. He goes on to describe the four major systems that need to be in place in any business to maximize the business potential. Norm then outlines the five performance drivers to a high-performing business. His presentation concludes by discussing the four dimensions of effectiveness for business owners and then asking a key question every successful business owner needs to answer.

Practice Management
Tuesday, September 15
12:45 pm - 2:00 pm
Daniel Torpey, CPCU
E & O Issues and Loss Control
Description:
In this session, the goals of the seminar and the importance of risk management in the reduction of avoidance of liability claims will be covered. The importance of technical compliance, effective and consistent communication, and thorough documentation to any successful risk management strategy will also be addressed.

Practice Management
Tuesday, September 15
2:15 pm - 3:30 pm
W. Murray Bradford
Pocket $17,000 in New Tax Deductions and Find Spendable Premium Dollars for Your Self-Employed Clients
Description:
Imagine your money growing in front of your eyes. That's what happens in this fun and entertaining tax-strategy session. You will identify $17,000 of new tax deductions from the money you spend everyday. Nuts and bolts topics include multiplying the deductions on your existing vehicle, spouse, children, home, entertainment, travel and medical, so that you have more money for retirement and a bigger net worth.

Practice Management
Tuesday, September 15
3:45 pm - 5:00 pm
Brian Ashe, CLU/Producer Panel
Leveraging LIFE to Build Your Practice
Description:
Brian Ashe, CLU, past president of the Million Dollar Round Table and past chair of the LIFE Foundation, will lead a discussion of top producers who will share how they put to work LIFE's educational and marketing materials in various sales situations to boost their production. NAIFA members who attend the workshop will return home with several transferable sales ideas and a better understanding of how LIFE can be used to build their sales practice.

Sales, Prospecting & Marketing
Sunday, September 13
4:00 pm - 5:15 pm
Stan Hustad
Sales Down? What Now? Try Marketing YOU!
Description:

Today more than ever you need to make a difference. *You* must market *you*. Products and services are commodities and professionals need to stand out in addition to their products. Ask yourself the question, "Why would clients want to work with me?" Stan will give you answer options AND teach you how to be a world-class marketer.

Sales, Prospecting & Marketing
Monday, September 14
4:00 pm - 5:15 pm
Robert A. Arzt, CLU, CHFC, LLIF
Accelerate Your Sales Success
Description:
What separates one sales person from another? Why does one succeed and another struggle? Sales success requires more than just knowledge. It also involves attitudes, values, and beliefs. By attending this interactive workshop you will not only learn about the content of the NAIFA Sales System and how it is designed to help you achieve professional growth and attain your business goals, but you will also learn about the following success concepts found in the NAIFA Sales System course:

- ♦ Understand the 4 Traits of Highly Successful Salespeople
- ♦ Release Your Inner Achievement Drive for Maximum Results
- ♦ Understand the Sales Congruence Model
- ♦ Learn a Six-step sales process that really works

Sales, Prospecting & Marketing
Tuesday, September 15
7:30 am - 8:45 am
Van Mueller, LUTCF
Two Minute Sales Ideas
Description:
Returning from the NAIFA Convention and Career Conference with just one good idea can make your participation a great success. Returning with dozens of good ideas could change the way you do business! Industry veteran and popular presenter Van Mueller moderates this workshop which features the best sales ideas from NAIFA members like you. Be ready to share your best sales idea during this session, and be ready to learn from your peers. The person who shares the best idea, as judged by a panel of NAIFA past presidents, will receive a complimentary registration to the NAIFA 2010 Convention and Career Conference. The top sales ideas will be included in a future issue of *NAIFA's Advisor Today*.

Sales, Prospecting & Marketing
Tuesday, September 15
3:45 pm - 5:00 pm
Matt Anderson
The 3 Keys to Getting More Referrals
Description:
Most advisors already know more than they realize about what it takes to get referrals, so why is it that so few of them get results? There are three parts to getting the referrals you deserve: some of the obstacles to asking are in our head, some of the knowledge is missing to ask successfully with increasingly cynical consumers, and some of the skills are rusty. We know by now there is no quick fix, but there is a way that works effectively. If you do a good job with your clients and most of them like you, come to this interactive workshop by a recent Program-In-A-Box presenter to find out what is not only worthwhile and important but also TRULY DOABLE for you to get way more referrals on a consistent basis. Remember how great it is to get that call or email saying 'got a referral for you'!

Leadership & LILI
Monday, September 14
7:30 am – 8:45 am

Kevin Bell, CLU, ChFC, JD
Leveraging LILI Tools to Improve Your Practice
Description:
Leveraging LILI Tools to Improve Your Practice uses basic principals taught in the NAIFA sponsored LILI Institute and applies them to you and your practice. This interactive workshop will give you insightful take-always that you can begin to use right away. Participants will have a chance to "sample" the LILI experience and have fun while doing it.

Leadership & LILI
Tuesday, September 15
2:15 pm – 5:00 pm
Lance Secretan
LILI 7 Alumni Workshop
Description:
Advance Registration and Ticket Required.
This year's LILI 7 promises to be the best yet! Lance Secretan brings business leaders a clear vision of what a positive, productive and inspiring organization looks like and how to get there, especially in these challenging and chaotic times. In this interactive session, participants will explore six essential values that lead to personal and organizational greatness and learn how inspiring leaders can transform their business environment from places of fear and resignation to powerhouses of effective performance. Author of 14 leadership books, Secretan is a master storyteller and was voted one of the nation's top 10 speakers.

NAIFA Connections
Sunday, September 13
2:30 pm – 3:45 pm
National Membership Committee
National Workshop #1
Description:
Don't miss the National Membership Workshop presented by the National Membership Committee. We know you will leave the workshop with proven membership recruitment and retention strategies that you can take back to your association and implement. Learn how to make the membership ask! The workshop is open to all membership chairs.

NAIFA Connections
Sunday, September 13
4:00 pm – 5:15 pm
National Membership Committee
National Workshop #2 (Repeat Session)
Description:
Don't miss the National Membership Workshop presented by the National Membership Committee. We know you will leave the workshop with proven membership recruitment and retention strategies that you can take back to your association and implement. Learn how to make the membership ask! The workshop is open to all membership chairs.

NAIFA Connections
Tuesday, September 15
2:15 pm – 3:30 pm
NAIFA Government Relations Team
Advocacy Workshop #1
Description:
In this workshop, you will discover the many ways to participate in grassroots and grass tops political activity. Learn to become a more effective "constituent lobbyist" for yourself, your clients and your business. Pick up the "how tos" that will augment your community connections and turn you into a trusted advisor for your elected representatives.

NAIFA Connections
Tuesday, September 15
3:45 pm – 5:00 pm
NAIFA Government Relations Team
Advocacy Workshop #2 (Repeat Session)
Description:
In this workshop, you will discover the many ways to participate in grassroots and grass tops political activity. Learn to become a more effective “constituent lobbyist” for yourself, your clients and your business. Pick up the “how tos” that will augment your community connections and turn you into a trusted advisor for your elected representatives.

Association Executives
Tuesday, September 15
7:30 am – 8:45 am
Magenta Ishak
G. Kenneth Morgan, CAE
Association PAC Administration
Description:
Learn the critical role that association executives play in IFAPAC’s success and the importance of an annual audit, internal controls and the proper uses of administrative vs. political funds. Take away “free” promotional ideas to boost fundraising and widen membership knowledge and acceptance of the PAC.

Association Executives
Tuesday, September 15
12:45 pm – 2:00 pm
Ellie Kennedy
G. Kenneth Morgan, CAE
Association Financial Administration Best Practices
Description:
Examine the critical role the association executive plays in assuring the fiscal integrity of the association by studying the tools necessary to provide a financial environment that is secure, encourages the accomplishment of the association's mission, provides timely and accurate information and assists in making prudent financial decisions.

Association Executives
Tuesday, September 15
3:45 pm - 5:00 pm
Susan Linck, CAE
Association Governance Best Practices
Description:
This program will examine structure and practices as key elements of successful association management. Linck will recommend ways in which volunteers and execs can think about their governance to see if it is effectively structured and she will offer tools to help associations implement practices that will help make the people in the structure effective as a working group. She will provide models and resources from the association management arena as well as a case study and practical advice on moving ahead to implement changes.
