ACCELERATE

HCB 2017 SALES KICKOFF

AGENDA

Sunday, January 15, 2017

11:00 am – 7:00 pm	**Hospitality Desk Open** *Artist Foyer*
12:00 pm – 1:00 pm	**Lunch – HCB Principals and SVP Advisory Board** *Metropolitan Room*
1:00 pm – 4:00 pm	**HCB Principals and SVP Advisory Board Meeting** *Metropolitan Room*
4:00 pm – 5:30 pm	**HCB Principals Meeting** *Metropolitan Room*
6:00 pm – 9:00 pm	**Casual Dinner** *McCormick & Schmick's*

Monday, January 16, 2017

7:00 am – 7:00 pm	**Hospitality Desk Open** *Artist Foyer*
7:00 am – 7:55 am	**General Breakfast** *Cassatt C/D*
7:10 am – 7:55 am	**Breakfast with the Institutions** *Cassatt C/D* Don't miss this opportunity to meet with institutional representatives at designated tables during breakfast.
8:00 am – 9:15 am	**Welcome and HCB 2020 Update** *Avedon Ballroom* *Jim Gelder, CEO, HCB* *Adam Malamed, COO, Ladenburg Thalmann Financial Services Inc.* *Teague Wright, Sr. VP, Distribution, HCB*
9:15 am – 10:15 am	**DOL and Repeal: Planning in Uncertain Times** *Avedon Ballroom* Learn how the new DOL fiduciary rules will affect your practice and, with the possible estate tax repeal, how to advise clients (and advisors!) as well as uncover new markets. *Bob Finnegan, Sr. VP, Advanced Sales Attorney, HCB* *Doug Baxley, VP of Compliance, Securities Service Network*
10:15 am – 10:30 am	**Break with the Carriers** *Artist Foyer*
10:30 am – 11:15 pm	**Opportunities Ahead: You Have What They Want!** *Avedon Ballroom* In an environment of economic shifts, changing consumer preferences, and emerging new markets, is there really a need for life insurance? Yes, there is! This presentation will show you why and where. *James W. Kerley, LLIF, Chief Membership Officer, LIMRA* *Jamie Stella, Client Relationship Director, LIMRA*

Monday, January 16, 2017 (continued)

11:15 am – 12:00 pm	**Sales Accelerator Program** *Avedon Ballroom* Position Highland as the place for advisors to grow their business. Avoid sales conversations that lack differentiation and unlock hidden opportunities in the policy valuation space. *Jon Mendelsohn, CEO, Ashar Group* *Charles Hollander, Jr., Co-Founder, Red Flag*
12:00 pm – 1:00 pm	**Lunch** *Cassatt C/D*

VP WORKSHOPS

	Pollock A	*Pollock B*	*Warhol A*
1:00 pm – 1:45 pm	**Get To Know the Ladenburg IBDs** Learn more about the Ladenburg Thalmann IBDs and why you should consider working in this space. *Trey Wall, VP, Independent Broker Dealer Strategies, HCB; Mark Spooner, VP, HCB NY Metro*	**The HCB Value Prop: Can You Differentiate Us From the Competition?** Learn successful strategies from the field on how to imprint the Highland story in the minds of advisors. *Marty Dooley, Managing Principal, HCB Heartland–Milwaukee*	**Planning for HNW & UHNW: The Basics** Learn the basics regarding dynasty trusts, defective grantor trusts, dual spousal lifetime access trusts, and trust decanting as well as gifting, discounted gifting, sales and why it is so important to plan today. *Bob Finnegan, Sr. VP, Advanced Sales Attorney, HCB*
2:00 pm – 2:45 pm	**HighCap Financial - Membership Has Its Advantages** HighCap Financial members submit three times as much business in a single year than any other producer. Learn why this is the case and how you can participate. *Craig Collins, Sr. VP, Business Development, HCB; Tony Catrini, AVP, Distribution, HCB*	**Selling Yourself and Leveraging Product Niches** Come and learn what Kirk Hill does to separate himself from the competition as well as how he has utilized recent innovative product niches to open doors with brokers. *Keith Miller, VP, Advanced Sales, HCB; Kirk Hill, VP, HCB Heartland*	**Economic Benefit and Loan Regime Split Dollar** The clients have utilized their gift and GST exemptions. See how split dollar plans can fund new life insurance in the most transfer tax efficient way possible, the pros and cons of each and where each regime is most appropriate. *Bob Finnegan, Sr. VP, Advanced Sales Attorney, HCB; Phillip W. Hegg, Legal Consultant, HCB Charlotte*
3:00 pm – 3:45 pm	**Beyond CrossXing: Introducing Multiline** P&C is one of the multiline channels. This workshop explains various methods to prosepct in this market. *Greg Zahn, AVP, Institutional Distribution, HCB*	**Sell Your Case Once** The art of field underwriting and jumbo case management. *Panel: Bob Brookie, AVP, Underwriting, HCB; Dorothy Penney, Underwriting Associate, HCB; Sue Pirog, John Hancock; H. Chalmers Edmiston, Jr., Associate Chief Underwriter, Lincoln Financial; Nancy Hoffman, FLMI Chief Underwriter, AXA*	**Generational Split Dollar** Understand Generational Split Dollar and how it can be designed and sold without depending upon aggressive discounts in order to provide maximum family benefits with minimal risks. *Bob Finnegan, Sr. VP, Advanced Sales Attorney, HCB*

3:45 pm – 4:00 pm	**Break with the Carriers** *Artist Foyer*
4:00 pm – 5:00 pm	**Small Message, Big Impact** *Avedon Ballroom* Deliver a more effective sales pitch that is persuasive and informative. Enhance your impact on clients with these verbal and non-verbal communication skills that will allow you to close more business. *Terri Sjodin, Principal and Founder, Sjodin Communications* *Sponsored by* John Hancock

5:00 pm – 6:00 pm	**Break before Dinner**
6:00 pm – 'til pm	**Turn Back Time – Dinner and Office vs. Office Karaoke Competition** *Cassatt Ballroom* Grab those bell bottoms and get ready for a 70s/80s themed dinner event featuring a friendly live-band karaoke competition between HCB Offices.

Tuesday, January 17, 2016

7:00 am – 7:00 pm	**Hospitality Desk Open** *Artist Foyer*
7:00 am – 7:55 am	**General Breakfast** *Cassatt C/D*
7:10 am – 7:55 am	**Breakfast with the Institutions** *Cassatt C/D* Don't miss this opportunity to meet with institutional representatives at designated tables during breakfast.
10:00 am – 6:00 pm	**HCB Photo Studio** *Artist Foyer* Head shots – Gentlemen, please wear a jacket and a tie.
8:00 am – 8:10 am	**Welcome** *Avedon Ballroom* *Teague Wright, Sr. VP, Distribution, HCB*
8:10 am – 9:10 am	**Accomplish More in 12 Weeks Than Most Do in 12 Months** *Avedon Ballroom* *New York Times* bestselling author and recognized expert in the field of leadership and execution, Brian Moran has helped thousands of people just like you accelerate their success and accomplish more in dramatically less time. *Brian P. Moran, New York Times Bestselling Author* *Sponsored by* Nationwide is on your side

VP WORKSHOPS

	Pollock A	*Pollock B*	*Warhol A*
9:15 am – 10:00 am	**What Do Financial Advisors Want from You?** We'll deep dive with a bank field-level expert who will show you how to open new doors and uncover opportunities in institutions. *Link Baker, Insurance Specialist, SunTrust; Jorge Ramirez, VP, HCB Southeast*	**Protecting Against Non-Financial Retirement Shocks** Dr. Bob presents on actionable strategies to combat forced early retirement, high out-of-pocket medical expenses, chronic illness, and living longer than expected. *Robert Pokorski, M.D., VP and Medical Director, Individual Life Insurance, Prudential*	**State-of-the-Art Trust Planning in Uncertain Times** Regardless of the outcome of repeal, learn strategies that allow greater client access, flexibility and control as well as avoid common trust pitfalls. *Brian Simmons, Sr. VP/Trust Officer, Premier Trust; Bob Finnegan, Sr. VP, Advanced Sales Attorney, HCB; Maurice Sturm, VP, Advanced Sales, HCB New England*
10:15 am – 11:00 am	**Growing Your Practice** Fine-tune your sales practice by learning from successful Highland VPs who grew their NHOR by 15% last year alone. Hint: It's all about the details - Join us to learn more! *Chris Soniat, VP, Business Development, HCB; Lisa Hehir, VP, HCB NY Metro; Kevin Taylor, VP, HCB Mid-Atlantic; Hugh Singletary, VP, HCB Southeast* **FOR HIGHLAND EMPLOYEES ONLY**	**Protecting Against Non-Financial Retirement Shocks (REPEAT)**	**Driving Your Accumulation Sales in a Post-DOL World** Broker dealers and producers alike require more disclosure, less process, and the ability to better service policies. Come and see how you can add incremental growth to your business, attracting more producers to the accumulation strategy. *Joseph C. Lee, National Sales Manager, Institutional Channel, Pacific Life - Life Insurance Division; Matt Workman, VP, HCB Southwest*

Tuesday, January 17, 2017 (continued)

11:15 am – 12:00 pm	**Growing Your Practice (REPEAT)** **FOR HIGHLAND EMPLOYEES ONLY**	**Drive Sales with MoneyGuidePro** Find selling opportunities by working with advisors using MoneyGuidePro. *Kevin Hughes, Sr. Enterprise Account Manager, PIEtech℠, Inc.; David Braun, Sr. VP, Institutional Distribution, HCB*	**Foreign National** Mike has grown his business by bringing value to foreign nationals. The cases are large, the demand is high, and our experience...second to none. *Mike Gomez, VP, HCB Southwest; Jorge Ramirez, VP, HCB Southeast; H. Chalmers Edmiston, Jr., Associate Chief Underwriter, Lincoln Financial*
12:00 pm – 1:00 pm	**Lunch** *Cassatt C/D*		
1:00 pm – 2:00 pm	**Best Kept Secrets: HCB Resources Highlight** *Avedon Ballroom* • **Data Mining** – *Chris Godsey, Operations Business Analyst II, HCB* • **Advanced Sales** – *Keith Miller, VP, Advanced Sales, HCB* • **Underwriting Advocacy** – *Dorothy Penney, Underwriting Associate, HCB* • **Social Media** – *Sarah Henry, Marketing & Social Media Manager, HCB*		
	VP WORKSHOPS		
	Pollock A	*Pollock B*	*Warhol A*
2:00 pm – 2:45 pm	**Opening New and Sustaining Old Relationships with Life Concepts** Come and learn how Paul Pistilli has leveraged Life Concepts and other HCB Advanced Sales resources to open up opportunities to build confidence and close sales with producers. *Keith Miller, VP, Advanced Sales, HCB; Paul Pistilli, VP, HCB Mid-Atlantic*	**CRM Hands-on Session** Get the most out of CRM by exploring common best-practices and time saving tips. **Bring your devices** to follow along. *Chris Godsey, Operations Business Analyst II, HCB*	**Cross-sell & Up-sell!** Covering other risks, such as LTCI and DI, is a necessary part of any good financial plan. Advise clients beyond life insurance - Learn more! *Michael Cogdall, Principal; Jeff Peterson Truluma DI; Steve Cain, LTCi Partners*
2:45 pm – 3:15 pm	**Break with the Carriers** *Artist Foyer*		
3:15 pm – 4:30 pm	**The Five Principles of Elite Teams** *Avedon Ballroom* Jason Redman, a Navy SEAL veteran of 21 years, shares what he learned about leadership, teamwork, and most importantly the "Overcome" mindset. *Jason Redman, Retired Navy SEAL*		*Sponsored by* Pacific Life
4:30 pm – 6:30 pm	**Break before Dinner**		
6:30 pm – 7:30 pm	**Awards Cocktail Reception** *Artist Foyer*		
7:30 pm – 9:30 pm	**Awards Dinner and Presentations** *Avedon Ballroom*		