



# MOMENTUM

## HCB 2018 SALES KICKOFF

JANUARY 14-17, 2018 • WESTIN DENVER INTERNATIONAL AIRPORT

## AGENDA

### Sunday, January 14, 2018

11:00 am – 7:00 pm	<b>Hospitality Desk Open</b> <i>Grand Foyer</i>
12:30 pm – 4:00 pm	<b>Principals' and SVP Advisory Board Meeting</b> <i>Boxelder</i>
4:00 pm – 5:30 pm	<b>Principals' Meeting</b> <i>Boxelder</i>
6:00 pm – 9:00 pm	<b>Casual Dinner</b> <i>Alder Ballroom</i>

### Monday, January 15, 2018

7:00 am – 7:00 pm	<b>Hospitality Desk Open</b> <i>Grand Foyer</i>
9:00 am – 5:00 pm	<b>Optional: Personal Tech Time</b> <i>Grand Foyer</i>
11:00 am – 6:00 pm	<b>HCB Photo Studio</b> <i>Grand Foyer</i> Head shots – Gentlemen, please wear a jacket and a tie.
7:00 am – 7:55 am	<b>Breakfast</b> <i>Alder Ballroom</i>
8:00 am – 9:00 am	<b>The Road to 2020: One Highland</b> <i>Spruce Ballroom</i> <i>Adam Malamed, EVP, COO, Ladenburg Thalmann Financial Services</i> <i>Jim Gelder, CEO, HCB</i> <i>Teague Wright, Sr. VP, Distribution, HCB</i>
9:00 am – 10:00 am	<b>Partners in Sales: Part 1</b> <i>Spruce Ballroom</i> <i>AIG, AXA, John Hancock, Lincoln, and Nationwide</i> Join our carrier partners for “more than a speed date” to hear top sales ideas for 2018!
10:00 am – 10:45 am	<b>In the Sea of Sameness, You Need a Brand</b> <i>Spruce Ballroom</i> <i>Lina Storm, VP, Field Marketing, HCB</i> Knowing your audience, who you are, what you bring to the table, and how to communicate it.
10:45 am – 11:00 am	<b>Awards (IBD, Multi-Line, and Annuity Awards)</b> <i>Spruce Ballroom</i>
11:00 am – 11:15 am	<b>Break</b> <i>Grand Foyer</i>

## Monday, January 15, 2018 (continued)

WORKSHOPS			
	Cherry	Boxelder	Birch
11:15 am - 11:45 am	<b>Life Settlements: Proven Ways to Generate Large Revenue Cases</b> Learn how Kevin Donnelly leveraged Ashar and exceeded HCB revenue goals with life settlement opportunities.  <i>Jon Mendelsohn, CEO, Ashar Group LLC and Kevin Donnelly, VP, HCB NY Metro</i>	<b>State-of-the-Art Private Financing</b>  <i>Bob Finnegan, Sr. VP, Advanced Planning Attorney, HCB</i>	<b>Partner with LTAIS for Annuity Success through Cross-Selling!</b>  <i>Mark Schubert, Chief Sales Officer, LTAIS and Crystal Duco, Director, Annuity Operations, LTAIS</i>
11:45 am - 1:00 pm	Lunch Alder Ballroom		
WORKSHOPS			
	Cherry	Boxelder	Birch
1:00 pm - 1:45 pm	<b>"Fresh Faces" to the Top 25 in Record Time (Repeats at 2:00 pm)</b>  <i>Lindsay Becker, VP, HCB Heartland; Greg Bronico, VP, HCB Mid-Atlantic; Eric Stein, VP, HCB NY Metro</i>	<b>Premium Financing - Best Practices &amp; New HCB Platform</b>  <i>Bob Finnegan, Sr. VP, Advanced Planning Attorney, HCB and Michael Sapyta, VP, Advanced Planning, HCB</i>	<b>Asking For the Check and For a Deeper Relationship (Repeats at 2:00 pm)</b>  <i>Jorge Ramirez, VP, HCB Southeast and Paul Pistilli, VP, HCB Mid-Atlantic</i>
2:00 pm - 2:45 pm	<b>"Fresh Faces" to the Top 25 in Record Time - Repeat</b>  <i>Lindsay Becker, VP, HCB Heartland; Greg Bronico, VP, HCB Mid-Atlantic; Eric Stein, VP, HCB NY Metro</i>	<b>Product: What's Hot and What's Not (Repeats Tues. at 2:45 pm)</b>  <i>Michael Sapyta, VP, Advanced Planning, HCB</i>	<b>Asking For the Check and For a Deeper Relationship - Repeat</b>  <i>Jorge Ramirez, VP, HCB Southeast and Paul Pistilli, VP, HCB Mid-Atlantic</i>
3:00 pm - 3:45 pm	<b>HCB Resources for Sales People (Repeats Tues. at 11:15 am)</b>  <i>Michael Sapyta, VP, Advanced Planning, HCB and Greg Zahn, AVP, Institutional Distribution, HCB</i>	<b>Building Reputation, Relationships, and Tailored Presentations</b> If you want to engage in the big cases, this is a session you won't want to miss!  <i>Kevin Donnelly, VP, HCB NY Metro and John Yocum, VP, HCB Mid-Atlantic</i>	<b>Town Hall with Marty Dooley</b> In this interactive session, you will hear tips and be able to ask advice about how to build a sustainable \$1 million NHOR practice.  <i>Marty Dooley, VP, HCB Heartland</i>
3:45 pm - 4:00 pm	Break Grand Foyer		
4:00 pm - 5:00 pm	<b>Why Are Some People So Good At Selling?</b> Spruce Ballroom <i>Ross Shafer, TV Host, Comedian, Business Motivator, Author and Consultant, Ross Shafer Consultants, Inc.</i>		
5:00 pm - 6:00 pm	Break Before Dinner		
6:00 pm - 'til pm	Casual Themed Dinner Event Alder Ballroom		

Tuesday, January 16, 2018

7:00 am – 7:00 pm	<b>Hospitality Desk Open</b> <i>Grand Foyer</i>
8:00 am – 2:00 pm 4:00 pm – 5:00 pm	<b>Optional: Personal Tech Time</b> <i>Grand Foyer</i>
9:00 am – 4:00 pm	<b>HCB Photo Studio</b> <i>Grand Foyer</i> Head shots – Gentlemen, please wear a jacket and a tie.
7:00 am – 7:55 am	<b>Breakfast with the Institutions</b> <i>Alder Ballroom</i> Join institutional representatives for a friendly, networking breakfast.
8:00 am – 8:25 am	<b>Welcome and Awards (HighCap and Institutional Awards)</b> <i>Spruce Ballroom</i> <i>Teague Wright, Sr. VP, Distribution, HCB</i>
8:25 am – 9:10 am	<b>Partners in Sales: Part 2</b> <i>Spruce Ballroom</i> <i>Pacific Life, Principal Financial Group, Protective Life Insurance, Symetra</i> Join our carrier partners for “more than a speed date” to hear top sales ideas for 2018!

WORKSHOPS			
	<i>Cherry</i>	<i>Boxelder</i>	<i>Birch</i>
9:15 am – 10:00 am	<p><b>HCB Customer Sells More Annexus than Anyone Else... Here’s the How and Why of It</b></p> <p><i>Steve Austin, Managing Member, Apex Financial LLC, HighCap Financial Member and James Hahn, EVP, Life Sales and Distribution, Annexus</i></p>	<p><b>Building Reputation, Relationships, and Tailored Presentations – Repeat</b></p> <p>If you want to engage in the big cases, this is a session you won’t want to miss!</p> <p><i>Kevin Donnelly, VP, HCB NY Metro and John Yocum, VP, HCB Mid-Atlantic</i></p>	<p><b>Institutional Focus Session – Wirehouses</b></p> <p>Hear directly from management and field level wirehouse leadership who will provide key insights for you to be successful in their firm in 2018.</p> <p><i>Baird, Janney Montgomery Scott (JMS), RBC, Stifel, UBS and Chase Allen, VP, Institutional Distribution, HCB</i></p>
10:15 am – 11:00 am	<p><b>How Do You Wake Up Every January 1<sup>st</sup> Knowing You Have \$1 Million PCs Coming? HighCap – That’s How.</b></p> <p><i>Craig Collins, Sr. VP, Head of HighCap Financial; Michael Pariano, Managing Principal, HCB New England; Edward Domanico, VP, HCB New York Metro</i></p>	<p><b>Team VP with Steve Kampwerth and Zachary Turmelle (Repeats at 11:15 am)</b></p> <p>For this team, it’s all about discipline and intention. Come and hear how they leverage their time to make the most out of their opportunities.</p> <p><i>Steve Kampwerth, VP, HCB West and Zachary Turmelle, Internal Sales Consultant, HCB West</i></p>	<p><b>Partner with Chubb – Maximize your Centers of Influence</b></p> <p>Meet and learn from Chubb Strategic Partnership Managers about how to best incorporate the Chubb referrals and relationships into your practice.</p> <p><i>Greg Zahn, AVP, Institutional Distribution, HCB; Zann Faust, VP, Strategic Partnerships Manager, Chubb; Ben Bollenbacher, VP, Strategic Partnerships Manager, Chubb</i></p>
11:15 am – 12:00 pm	<p><b>HCB Resources for Sales People – Repeat</b></p> <p><i>Michael Sapyta, VP, Advanced Planning, HCB and Greg Zahn, AVP, Institutional Distribution, HCB</i></p>	<p><b>Team VP with Steve Kampwerth and Zachary Turmelle – Repeat</b></p> <p>For this team, it’s all about discipline and intention. Come and hear how they leverage their time to make the most out of their opportunities.</p> <p><i>Steve Kampwerth, VP, HCB West and Zachary Turmelle, Internal Sales Consultant, HCB West</i></p>	<p><b>Institutional Focus Session – Banks</b></p> <p>Hear directly from management and field level bank leadership who will provide key insights for you to be successful in their firm in 2018.</p> <p><i>Citi, Infinex, Regions, SunTrust, Wells Fargo Advisors (WFA) and Chase Allen, VP, Institutional Distribution, HCB</i></p>

Tuesday, January 16, 2018 (continued)

12:00 pm – 1:30 pm	<b>Lunch</b> <i>Alder Ballroom</i>		
1:30 pm – 2:30 pm	<b>Technology: How and Why it Matters to Life Insurance Sales in 2018</b> <i>Spruce Ballroom</i> <i>Anthony Lancaster, Sr. VP, COO, HCB &amp; Ladenburg Annuity (LTAIS)</i> <i>Dan Sacher, VP, Enterprise Innovation, Ladenburg Thalmann Financial Services</i> <i>Greg Zahn, AVP, Institutional Distribution, HCB</i>		
<b>WORKSHOPS</b>			
	<i>Cherry</i>	<i>Boxelder</i>	<i>Birch</i>
2:45 pm – 3:30 pm	<b>Product: What's Hot and What's Not – Repeat</b> <i>Michael Sapyta, VP, Advanced Planning, HCB</i>	<b>The Latest Gadgets and Apps to Help You Sell More</b> <i>Chris Godsey, Manager, Information Technology, HCB</i> <i>and Joel Connelly, Technology Support Specialist II, HCB</i>	<b>Opportunities with the New Tax Law</b> <i>Bob Finnegan, Sr. VP, Advanced Planning Attorney, HCB</i> <i>and Maurice Sturm, VP, Marketing &amp; Advanced Sales, HCB New England</i>
3:30 pm – 3:45 pm	<b>Break</b> <i>Grand Foyer</i>		
3:45 pm – 4:45 pm	<b>State of the Economy</b> <i>Spruce Ballroom</i> <i>Philip Blancato, President and CEO, LTS Asset Management</i> Philip is a frequent guest on CNBC and a well-known financial services expert. You don't want to miss this overview of the state of U.S. economic affairs as it relates to life insurance and the financial services industry overall.		
4:45 pm – 6:00 pm	<b>Break Before Dinner</b>		
6:00 pm – 7:00 pm	<b>Awards Cocktail Reception</b> <i>Grand Foyer</i>		
7:00 pm – 9:30 pm	<b>Awards Dinner and Presentations</b> <i>Spruce Ballroom</i>		

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