

2022 Annual Conference Agenda

Virtual Conference – March 24-25, 2022

Thursday, March 24, 2022	
Welcome & In-Depth Government Benefits and Helping Attorneys Can Minimize Their Exposure Speaker: Jay Robert and Greg Maxwell, Esq., CFP®	12:00 pm - 1:00 pm EST
Structuring Your Practice: Plans Over Product Speaker: Joseph Tombs, Stacy Scrip, Ryan Garrison	1:00 pm - 2:00 pm EST
Non-Qualified Spotlight: Capitalize on Unique Market Opportunities Speaker: Stephen Halterbeck, RSP	2:00 pm - 3:00 pm EST
Marketing for the New Normal Speakers: Chris Bua, J.D., Courtney Barber, Dan Finn, CPCU, MSSC®, RICP®, Christopher Harlan, Tracee Wagner	3:00 pm - 5:00 pm EST
Friday, March 25, 2022	
Become a Trusted Advisor: Opening the Door with Fee Deferrals Speaker: Leif Lundberg, John Meaney, Chris Bua, J.D., Anthony Alfieri, JD, RSP, CMSP	12:00 pm - 1:00 am EST
Negotiating Tax Strategies at Settlement Speaker: Jeremy Babener	1:00 pm - 2:00 pm EST
Alternative Compensation Arrangements: From Co-Brokers to Consultant Fees Speaker: Ryan Garrison, Sean Pendray, CSSC, ChFC®, RSP, Joseph Di Gangi, CFP, CSSC	2:00 pm - 4:00 pm EST