

Register Early & Save!

EARLY BIRD REGISTRATION COSTS:

\$110 for NAIFA Members

\$190 for Non-Members

\$995 for Table of 10

Deadline: Friday, August 31, 2018

REGISTER TODAY!

ONLINE at www.naifa-columbus.org;

EMAIL Executive Director Renae Davies at
exec@naifa-columbus.org; or

MAIL in your check payment to NAIFA-Columbus with
"MDRT Event" in the memo line

Arrive Early & Network!

WELCOME RECEPTION

Sunday, October 14, 2018
5:30 p.m. - 7:00 p.m.

The Pub at Nationwide Hotel and Conference Center

Network with several of the MDRT Event Speakers and Financial Advisors throughout Ohio during this intimate, casual event. This event will include hors d'oeuvres and a cash bar. Free to Attend!

Reserve Your Room Today!

HOTEL INFORMATION

*Nationwide Hotel and Conference Center
100 Green Meadows Drive South
Lewis Center, Ohio 43035*

Room Rate: \$139.00 Single / \$149.00 Double
Reservation Deadline: September 21, 2018
For Reservations: (614) 880-4300

COLUMBUS
NAIFA
3755 Attucks Drive
Powell, Ohio 43065

7th Annual



A day of inspirational ideas to take your business to the next level and beyond!

Monday, October 15, 2018
8:00 a.m. - 3:30 p.m.

*Nationwide Hotel and Conference Center
100 Green Meadows Drive South
Lewis Center, Ohio 43035*

featuring...

I. David Cohen, CLU, ChFC, LUTCF
*NAIFA-Columbus Past President
and MDRT Qualifying and Life Member*

Chris Holtmann
OSU Men's Basketball Head Coach

U.S. Congressman Jim Jordan
Representing Ohio's 4th District

Jill Judd, LUTCF, FSS
NAIFA National President-Elect

Paul Karasik
MDRT Platform Speaker

Moshe A. Milevsky
Professor at York University in Toronto, Canada

7th Annual “A Day with MDRT” Event | About our Program and Speakers

“Prospect or Perish”

Prospecting is a--- How to not stop prospecting. The great law-- continue to prospect and you can't fail- stop prospecting, short of your goal, you can't excel, nor even succeed



I. David Cohen, CLU, ChFC, LUTCF Independent Financial Advisor

David Cohen began his career in June 1958, as an agent, and has never altered his focus. He first qualified for MDRT in 1961 and has been a member for 56 years. Currently, he is a qualifying and life member. David is one of 140 MDRT members who have achieved membership for over 50 years.

He has been a member of NAIFA-Columbus since 1959 serving as chairman of every committee, was a trustee for many years and served as president in 1978 – 1979, and again in 2015-2016. The local chapter honored him in 2004 by renaming its Lifetime Achievement Award to the I. David Cohen Lifetime Achievement Award. In 2007, The American College purchased publishing and distribution rights to his book “Prospect or Perish”. Today it is a curriculum course in the FSCP program sponsored by the College.

“The NEW NAIFA: Traditional Values, Progressive Innovation”

Overview of how NAIFA looks today, how we are positioned for growth in all areas, and why we are leading as the trusted voice for our industry



Jill Judd, LUTCF, FSS NAIFA National President-Elect

Jill Judd opened her State Farm Insurance Agency September 2001 in Capitola, California. At the beginning of her career in the insurance industry she was honored among the “Top 100” New Agents in the nation for each of her first three years in the business. Jill has been an Ambassador for Life Qualifier and has been recognized as a member of the State Farm Senior Vice President’s Club multiple times.

Jill currently serves on the Executive Committee as the NAIFA President-Elect and the National Membership Chair. She served as a Trustee, was on the Quality Member Experience Task Force and the Strategic Planning Task Force: NAIFA 20/20, the CEO Search Committee, and continues to serve on the NAIFA Finance Committee.

“My experience with Leadership and Culture in Athletics”

An inside perspective from the Head Coach of Ohio State Men’s Basketball on leadership building and having a positive culture within a team



Chris Holtmann, Head Coach The Ohio State University Men’s Basketball

Chris Holtmann begins his second season at the helm of the Buckeyes in 2018-19 following an inaugural season at Ohio State in which he was named the 2018 Big Ten Coach of the Year. During this first season, he led the Buckeyes to a 25-9 overall record, a No. 2 finish in the Big Ten regular-season standings (15-3), and a Second Round appearance in the 2018 NCAA Tournament. The Buckeyes stormed out to a 9-0 record in Big Ten Conference play, the best start to a league season by a first-year Big Ten coach in 95 years

The Big Ten Coach of the Year award was the second COY honor in as many seasons, and third overall for Holtmann, who earned Big East COY in 2017. The Big East award culminated three seasons as head coach at Butler University. Holtmann became the 14th head coach in Ohio State history when he was named to the position June 9, 2017.

“Double Your Income”

This high-content and inspirational program will provide financial advisors with strategies and techniques they need to create and achieve their personal and professional goals.



Paul Karasik, Founder American Seminar Leaders Association

Paul Karasik is the President of the Financial Advisor Coaching Institute and the Wholesaler Institute. Paul has devoted over 20 years to helping sales and management professionals achieve their goals. Paul is the author of four all time business classics, 22 Keys to Sales Success, Seminar Selling, Sweet Persuasion, and Mastering the Art of Wholesaling. His most recent books are How to Market to High-Net-Worth Households and Brilliant Thoughts.

Paul is the Founder of the American Seminar Leaders Association and a popular presenter at national meetings and conferences including the Million Dollar Round Table, and the National Association of Insurance and Financial Advisors. Recently his life and work was featured in a PBS Special, If My Heart Could Do My Thinking.

“Current Legislation in the U. S. House of Representatives”

Current legislation in the U.S. House of Representatives will be discussed with a Q and A segment to follow, allowing attendees to ask questions



U.S. Congressman Jim Jordan Ohio House of Representatives - 4th District

Jim Jordan is a fiscal conservative who believes that families and taxpayers, rather than government, know best how to make decisions with their money. Throughout his career, Jim Jordan has led the fight against tax hikes, including those proposed by his own political party. He believes that cutting taxes and letting families keep more of what they earn helps build strong communities and a vibrant economy.

In Congress, in 2009, he introduced the only balanced budget alternative to President Obama’s budget. In the 112th Congress, he served as Chairman of the House Republican Study Committee, the largest caucus of conservatives, advancing conservative ideas and solutions on Capitol Hill. In the 114th Congress, he helped found the House Freedom Caucus, and is currently serving as its first Chairman.

“Financial Aging: Why Your Retirement Plan should be based on Biology not Chronology”

Learn how to optimize asset allocation, life insurance, annuity and retirement decisions, using true biological age, not chronological age



Moshe A. Milevsky, Professor York University, Toronto, Canada

Moshe Milevsky is a finance professor at the Schulich School of Business at York University in Toronto. He is also a member of the graduate faculty in the Department of Mathematics and Statistics and Managing Director of PILECo. He has published 13 books and over 60 peer-reviewed scholarly papers, in addition to hundreds of popular articles and blog pieces.

He is a fin-tech entrepreneur with a number of U.S. patents and computational innovations in the retirement income space. He was named by Investment Advisor magazine as one of the 35 most influential people in the U.S. financial advisory business during the last 35 years, and he received a lifetime achievement award from the Retirement Income Industry Association.