2017 Entrepreneurial Summit

Las Vegas, Nevada September 25-27, 2017

Building a Bigger, Brighter Future

AFG Brokerage
keep what you earn

AFG Brokerage Welcomes You

to the 2017

Entrepreneur Summit

At AFG Brokerage
our Purpose is to:

Make Your
Dreams and Goals
a Reality

and our Vision is to:

Help You Build a
Bigger, Brighter Future
for your clients!

Make Your Dreams and Goals a Reality

monday September 25, 2017

12:00PM – 2:00PM	Arrival and Check-In	
2:00PM – 2:10PM	Welcome	Todd Ashton
2:10PM – 2:30PM	Technology at Your Finger Tips	Stephen Ashton
2:30PM – 3:30PM	2017 Top Planner Idea Exchange	Stephen Ashton
3:30PM – 4:00PM	Networking Break	
4:00PM – 5:00PM	The Power of Zero!	Lee Rogers
6:30PM – 7:00PM	Cocktail Reception Hosted by AFG Brokerage	
7:00PM – 7:30PM	Carrier Dine Around	

tuesday September 26, 2017

6:45AM – 8:00AM	Continental Breakfast	
8:00AM – 8:10AM	Welcome	Todd Ashton
8:10AM – 8:50AM	Changing the Conversation	Mike Bellig
8:50AM – 9:50AM	Marketing through Credit Unions	Reagan Wagner
9:50AM – 10:15AM	Networking Break	
10:15AM – 11:25AM	Six Developments You Should Be Talking About Now	Linas Sudzius
11:25AM – 11:55PM	Current Events	Partner Panel
11:55AM – 12:30PM	Lunch	
12:30PM – 1:15PM	CHEERS Client Mining System	Joel Robison
1:15PM – 2:00PM	Networking Break	
2:00PM – 5:30PM	Private Meetings (see packet for schedule)	
6:30PM	AFG Brokerage Banquet	

Build a Bigger, Brighter Future for Your Clients

wednesday September 27, 2017

6:45AM – 8:00AM	Continental Breakfast	
8:00AM – 8:10AM	Welcome	Todd Ashton
8:10AM – 8:40AM	Insurance Industry 2020	Partner Panel
8:40AM – 8:55AM	The Future of Long Term Care	Ken Herlihy
8:55AM – 10:25AM	Turning Your Life Plan into YOUR Legacy	Alan Pratt
10:25AM – 10:45AM	Networking Break	
10:45AM – 11:30AM	10X Your Practice starting Today!	Tony Ashton
11:30AM – 11:55AM	The Agency Perpetuation Strategy	Robert Ashton
11:45AM – 12:00PM	Meeting Wrap-Up	Tony Ashton
12:00PM	Departures	

notes

Alan Pratt, CEP, CAP

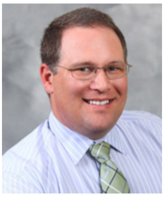
Alan Pratt, CEP, CAP is a family legacy advisor specializing in philanthropy and family wealth preservation. He brings a unique blend of personal experience and technical knowledge to the estate planning process. Alan helps families understand, in plain English, their options for preserving wealth in a way that honors their underlying values. Alan's company, Pratt Legacy Advisors practices a unique form of estate planning that goes far beyond strategic wealth distribution. Alan believes that a meaningful estate plan comes from knowing your values, living your values, and planning from your values. His firm has created Legacy Planning from the Heart™, a process to help you integrate your life experiences with your estate plan, while maintaining ongoing communication within your family. He holds trust, listening, and life-long relationships as core values in everything he undertakes and shares from his own personal experiences.

Alan is in demand as a speaker at regional, national, and international conferences dealing with family relationships, wealth preservation, and stewardship. He is recognized as a leader in Advanced Life Insurance designs, which is often used as a strategy to responsibly transition family wealth.

He earned his Chartered Advisor in Philanthropy designation in 2006 and currently serves as the Chief Ambassador of The International Association of Advisors in Philanthropy (AIP). In 2007, he became a founding member of the Seattle Philanthropic Advisors Network (SPAN) and currently serves on the Board as Vice President. He is an active member of the National Institute of Certified Estate Planners, Washington Planned Giving Council, and the Seattle Chapter of the National Association of Insurance and Financial Advisors. Alan serves on the Advisory Board of the Chief Seattle Council–Boy Scouts of America and the Seattle Christian Community Foundation. Alan and his wife, Helen, were married in 1984 and have 3 children.

Linas Sudzius, JD, CLU, ChFC

Linas worked for a Chicago-based insurance company as their Director of Advanced Sales and most recently as their Chief Marketing Officer. He now manages and active estate planning law practice in Franklin, Tennessee. Linas is the author of Think About It and Golden Bullets. He is also the author of the book *What Most Life Insurance Agents Won't Tell You*.



Reagan Wagner

Reagan graduated from St. Mary's University in San Antonio, Texas with a B.S. in Biology and a Minor in Chemistry. Following graduation, Reagan worked with a large grocery store chain in San Antonio from 1997 to 2004. Leaving the chain in 2004 as a project leader for the Environmental Department, he started his own business in the Financial Services Industry. In 2007, he partnered with his father, Bob Wagner, and Joel Swinehart to create the National Financial Alliance, LLC. A firm dedicated to full service financial planning. Reagan is also Chief Compliance Officer and Managing Principal of Strategic Financial Concepts, LLC, a Registered Investment Advisory firm. Reagan's financial practice is a Goals-based practice focused on Estate and Wealth Planning for clients with a net worth of $5 million or more.

Reagan has been married since 1999 to the love of his life, Deborah, and they have 3 wonderful children, Rylan, Robert, and Addison.

Stephen Ashton, CFP

With over 15 years of experience in the life insurance industry including membership in MDRT's Top of the Table, Stephen is extremely knowledgeable in all the aspects of the life insurance industry. He earned his designation of Certified Financial Planner™ which is the recognized standard of excellence for competent and ethical personal financial planning. Stephen is constantly increasing his understanding of financial services through organizations such as MDRT, The Wisdom Link, Empowered Wealth, and Entrepreneur Matters.

Stephen enjoys participating in the community and volunteering with the Boy Scouts of America. Stephen and his wife of over 10 years, Korbi, enjoy spending time with their 6 children, encouraging them in their many endeavors.

Tony Ashton, CLU

With over 20 years of experience in the life insurance industry including membership in MDRT's Top of the Table, Tony is well-versed in all the aspects of the life insurance industry. Tony has a passion for the life insurance industry and providing solutions to client's complex financial problems. Tony continues to grow his knowledge by participating with many of the world's foremost experts in planning through organizations such as The Strategic Coach, The Forum 400, MDRT, The Wisdom Link, Empowered Wealth, and Entrepreneur Matters. Tony and his family enjoy outdoor sports and volunteering in the community. Tony enjoys spending time with his wife of over 20 years, Mary, and helping his 3 living children and 1 grandson become productive members of society.