NAIFA FLORIDA

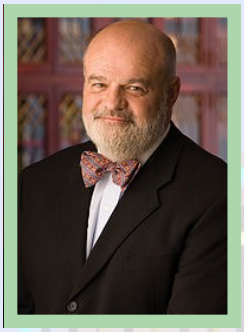
Financial Advisors Sales Symposium & Annual Conference

Orlando • June 16-17

Boost Your Career

Amazing Workshops • Exhibitors

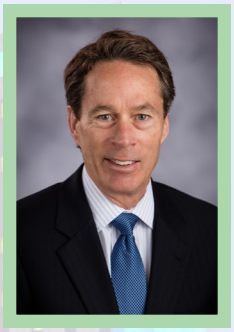
Continuing Education • Sales Tips



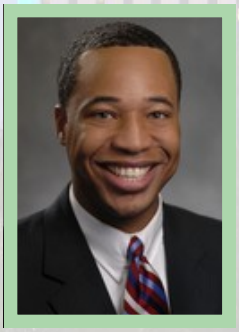
Joe Jordan

Lakitsia Gaines

Simon Reilly



Cliff Karthauser, CLU, ChFC, CLF



Bryan Hughes, BBA

Paul Caspersen, CFP, MS

Todd Keith

Tim Meenan

Industry Networking • Legislative Update

EARLY BIRD!

* Ends 5/19
Save now on hotel and registration!

Full Registration- $299* • Day Passes Available

Register online at:
www.naifa-florida.org

Questions? Email admin@naifa-florida.org

Financial Advisors Sales Symposium & Annual Conference

Orlando • June 16-17

AGENDA

Friday, June 16

8:00 a.m.– 6:15 p.m. Exhibit Hall Open

9:00 – 12:00 p.m. Citizens Agent Recertification Program

9:00 – 11:10 a.m. Open / Main Platform Speakers

- Simon Reilly —"7 Actions to Take Now to Meet and Exceed Your Goals" You know you want to grow your business and earn more money but don't know where to start! Planning is a critical part of business growth. One of the biggest reasons that people fail to realize success is that they fail to plan for it.

- Joe Jordan -- As one of the most recognized names in the industry, Joe Jordan passionately believes that financial services is the noblest profession in the world. His message inspires financial services experts to become modern-day heroes, motivating financial experts to reaffirm their purpose.

11:10 – 11:20 a.m. Break

11:20 – 12:30 p.m. Workshops

12:30– 1:15 p.m. Lunch

1:15 – 2:45 p.m. Main Platform Speakers

- Lakitsia Gaines – Learn the qualities it takes to be successful! Kitsia's inspirational message will motivate you to change your attitude and outlook about yourself and your career. A State Farm agent from South Florida and MDRT qualifier, she has worked in her community promoting financial literacy and has appeared on the "Steve Harvey Morning Show" discussing financial matters.

- Cliff Karthauser , CLU, ChFC, CLF– We are all faced with challenges and obstacles that can become defining moments that help move us forward rather than set limitations. From Lincoln, NE, Cliff was with Principal Financial Group for 35 years and is a former world class distance runner. He will challenge you to reflect on your own journey with passion and purpose.

2:40 – 2:50 p.m. Break

2:50 – 3:40 p.m. Small group sessions with Main Platform speakers

3:40 – 3:50 p.m. Break

3:50 – 5:10 p.m. Main Platform Speakers

- Bryan Hughes, BBA -- With NML in Miami, Bryan has numerous company and national awards and honors for his production. He built his very successful business by learning Russian and serving in that market. Bryan sits on the Board for Russian Connections, an organization to foster the growth of Russian-owned businesses. Hear his amazing story of creating an extremely productive niche market!

5:15 – 6:15 p.m. Cocktail Reception

7:30 p.m. Young Agents Team (YAT) Event

Saturday, June 17

8:00 a.m.– 3:30 p.m. Exhibit Hall Open

9:30 – 10:45 a.m. Open / Main Platform Speakers

- Paul Dougherty, LUTCF, FSS, HIA—Paul is the 2016-17 NAIFA President and a State Farm agent in Hyattsville, Maryland. He is the past president of NAIFA-Maryland, and served as the chair of the Coalition for Retirement Savings in Maryland, which includes the American Council of Life Insurers and Securities Industry and Financial Markets Association.

- Tim Meenan- Hear about new laws impacting YOUR business from NAIFA-Florida Lobbyist Tim Meenan! Protecting financial advisors from harmful legislation keeps you in business. Get the latest from the Capitol in Tallahassee!

10:45 – 11:00 a.m. Break

11:00 – 11:50 a.m. Professional Development Breakouts

- Paul Caspersen, CFP®, MS - "Top 3 Ways to Position Life Insurance for Charitable Planning" – As Assistant Vice President of Gift Planning and Central Development at the University of Florida Foundation, Paul is most suited to help advisors understand how life insurance can be used as a charitable giving tool. He has raised over $100 million in personal fundraising since 2009.

- Todd Keith – "The 10 Top Trends in Employee Benefits" --- Looks at where and why employee benefits started, where they are now, where they are going in the foreseeable future as well as how an advisor can position those products and services to best meet the needs of the client or group they are working with. Also, discussion as to the different "supplemental benefits", without being company specific to remain impartial.

- Terri Seefeldt, RHU -- "Health Industry Update for 2017" – Terri provides an update to health insurance advisors on the latest industry changes. Whether it's in Washington or Tallahassee, legislators are very busy these days dealing with health insurance issues. For a quick overview of the industry, Terri's class will be extremely helpful!

11:50 – Noon Break

Noon - 2:15 p.m. Awards/LILI Graduation Luncheon

2:30– 3:30 p.m. Main Platform Speaker

- Kevin Mayeux, NAIFA CEO – Kevin brings attendees the latest news and updates about programs and initiatives that NAIFA is working on – to provide enhanced services and benefits to members. From NAIFA headquarters in Falls Church, VA, Kevin oversees the staff and facilitates the Board of Directors, providing direction and leadership for both.

3:30 – 3:40 p.m. Exhibitor Door Prizes, Grand Prize

3:45 – 4:45 p.m. Delegate Assembly & Annual Meeting

4:45 – 6:30 p.m. Break

6:30 – 7:15 p.m. Presidents Reception

7:15 – 9:15 p.m. President's Banquet

Sunday, June 18

8:oo a.m.—1:00 p.m– 5 Hour Law and Ethics Continuing Education

ATTENDEE INFORMATION

Sales Symposium & Annual Conference
June 16-17, 2017
Orlando, FL

NAIFA FLORIDA

Register online at www.naifa-florida.org or mail this form to PO Box 14365, Tallahassee, FL 32317

Name _____ Company _____

Address _____ City/St/Zip _____

Phone _____ E-mail _____

First Name for Badge _____ Designations for Badge: _____

Full Registration	**Early Bird** Ends 5/19	**Standard** 5/20-6/9
Member	$299	$369
Non-Member	$399	$469
Special Registration		
Past State President		$199
YAT Member		$249
Local Association Executive		$199
Citizen's Workshop ONLY (Friday) ***		$39
5-Hour Law/Ethics CE ONLY (Sunday) ****		$39
Day Pass Registration	**Member**	**Non-Member**
Friday Pass * for $99 group rate see 'Special Notes'	$119	$149
Saturday Pass **	$199	$239
Spouse/Guest (non-member, non-licensed)		
Guest Pass		$149
Name for badge:		
Extra Tickets		
Saturday Awards Luncheon	$50 x _____ = $ _____	
President's Reception and Banquet	$85 x _____ = $ _____	

Payment Method

Total to be charged $ _____ Check Enclosed– Made payable to NAIFA-FL ☐

Please charge to: ☐ Visa ☐ Master Card ☐ AMEX– will be charged online through the NAIFA-FL PayPal account

Card # _____ - _____ - _____ - _____ Exp. ____ / ____ CVV Code _____

Signature _____

~~~~~~~~~~~~ Mail to NAIFA-Florida, PO Box 14365, Tallahassee, FL 32317 ~~~~~~~~~~~~

CANCELLATION POLICY: Full refund less $25.00 processing fee. We are sorry but no refunds after May 15, 2017 - no exceptions. Once we guarantee our room block and meals we must pay the hotel for them.

More information on conference programming and workshops at www.naifa-florida.org

ADDITIONAL WORKSHOPS

Thursday, June 15– Local Leaders Only Association Leadership Conference

Will you attend? ☐ Yes ☐ No

Friday, June 16- Citizens Workshop***

Will you attend? ☐ Yes ☐ No

Sunday, June 18- 5-Hour Law & Ethics Update for Life & Health Advisors ****

Will you attend? ☐ Yes ☐ No

HOTEL INFORMATION

Rosen Centre Hotel
9840 International Drive
Orlando, Florida 32819

The Rosen Centre Hotel is our host hotel and rooms are **$149** per night. Reservations must be made using the hotel's reservation department by calling (800) 204-7324.

Do not delay making your room reservations; we expect our room block to sell out very quickly. All reservations must be made prior to May 15, 2017.

Reservations: (800) 204-7234
Rate Code: "Florida Association of Insurance and Financial Advisors– Annual Conference"

SPECIAL NOTES

* $99 Group rate for agencies – contact Tom Ashley (tom.ashley@naifa-florida.org)

** Includes Awards Luncheon. Does not include Presidents Banquet

*** Included with Registration or Day Pass

**** Included with Registration

If we can assist with special accommodations, please call 850-422-1701 or email admin@naifa-florida.org.

Questions? Please call 850-422-1701 or email admin@naifa-florida.org.
~~~~~~~~~~~~

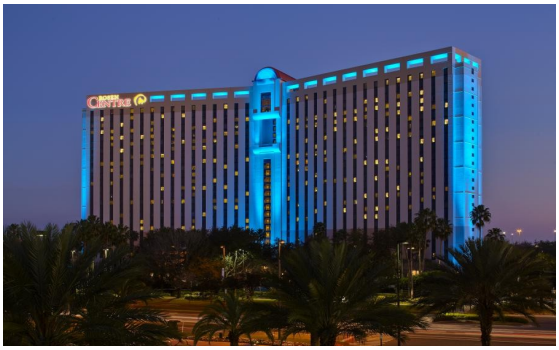
NAIFA-Florida
PO Box 14365
Tallahassee, FL 32317

Presort Standard
U.S. Postage
PAID
Tallahassee FL
Permit No. 590

NAIFA
FLORIDA

Financial Advisors Sales Symposium & Annual Conference

Orlando • June 16-17



ROSEN CENTRE HOTEL
9840 International Drive
Orlando, FL 32819

Top Sales and Motivational Tips
Brought to you by:

Joe Jordan
Bryan Hughes, BBA
Cliff Karthauser, CLU, ChFC, CLF
Simon Reilly
Lakitsia Gaines

Full Registration- $299 • Day Passes Available • Rooms- $149 Per Night (S/D)