

NAIFA Chicagoland Success Summit

“Up Your Game”

Agenda - April 08, 2026

8:30 a.m. - 11:30 a.m.	Ethics Class
11:30 a.m. - 12:00 Noon	Registration
Noon - 12:50 p.m.	Lunch and Vendors
12:50 p.m. - 1:00 p.m.	Welcome
1:00 p.m. - 1:50 p.m.	Sara Clegg “ <i>Bright Directions 529 Advisor Directed College Savings 529 Account Basics and Benefits.</i> ”
1:50 p.m. - 2:40 p.m.	Carroll Golden “ <i>Leading in the New Retirement Era: How to Lead, Adapt and Win in an AI-Driven World.</i> ”
2:40 p.m. - 2:55 p.m.	Break with the vendors
2:55 p.m. - 3:05 p.m.	“Member of the Year” and recognition of long-term members
3:05 p.m. - 3:15 p.m.	George Bain “ <i>Certified Housing Equity Advisor Designation.</i> ”
3:15 p.m. - 3:20 p.m.	Membership Presentation “ <i>The NAIFA Membership Promise.</i> ”
3:20 p.m. - 4:10 p.m.	Brian Byars “ <i>Media Marketing and Message Mastering.</i> ”
4:10 p.m. - 4:15 p.m.	IFAPAC Presentation
4:15 p.m. - 5:05 p.m.	AI Council “ <i>Practical AI for Insurance and Financial Advisors.</i> ”
5:05 p.m. - 5:15 p.m.	Closing Remarks and Raffle Prize drawings
5:15 p.m.	Happy Hour – <i>Networking and Meet the Guest Speakers</i>

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