



DI Isn't Hard, It's Just Different

NAIFA-Texas Disability Insurance Awareness Month Webinar

Wednesday, May 4th, 2022

11:30 AM Central Time

Panelist Bio



Dr. Rodney Mogen, DBA, DFP, MFP, ME, MBA, AAMS, CRPC, CCS, CEP, CLTC

Solve UR Puzzles

President & Chief Strategist

Dr. Rodney Mogen, with Mass Mutual and Solve Ur Puzzles, is a 20+ year veteran in the financial industry.

Rodney graduated from Macalester College, in St Paul MN in 1999 with a double major in Economics and Finance, and minors in Psychology, History, and Art. He started off as a financial planner with Ameriprise Financial/IDS, grew a 500 annual planning practice, went into management, ran their financial planning unit, insurance call centers, while building and growing a 100 advisor agency. He then moved over to wholesaling, building a large presence as a top wholesaler, winning wholesaler of the year three times, and being recognized nationally for his speed of producing life and DI cases, averaging over 70 a week with his advisers and maintaining an industry high average of 13 business days submission to issue. In addition, Rodney became a well-known small business expert for start-ups and growth stage businesses, advising and working with incubators all over the country helping create a strong system and process by doing business plans and helping mentor structure and leaders.

As a producer, Rodney and his team have been in the top 25 of several companies in DI and LTC production since 2001, doing over 3,400 DI policies, 835 Long Term Care Policies, 3,500 life policies, 265 individual health policies and 465 Med Supplements in 2021, and well on his way to success in 2022.

Rodney has a Doctorate in Business Administration focusing on Small Business and Individual Practice Development, Doctorate in Financial Planning, Master's in Business Administration, Master in Entrepreneurial Financing, Master's in Economics, Master's in Entrepreneurial Development, and Master's in Financial Planning, a MBA, the new National Association of

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Insurance and Financial Advisors designation LACP (Life and Annuity Certified Producer), AAMS CRPC, CCS, and over 26 more designations.

In 2012, Rodney opened his own business as an Advisor Consultant and small business specialist called Mogen Consulting Financial & Training LLC, helping advisors build fiduciary practices, train and hire staff and junior advisors, create succession planning, plus help advisors find the best insurance and income solutions for their clients and other strategies through Solve Ur Puzzles. Rodney has built a strong advisor consulting practice helping RIA's, P&C, Employee Benefit Advisors, and other industry specialists grow their practice the right way, be a fiduciary, and is their specialist in the advanced insurance design, Disability, income ladder, and Long-Term care specialties.

Rodney focuses on technology and systems and processes when coaching and working with advisers, helping them identify gaps in their business, and stays on top of all the tools out there, and figures out ways to make them work.

Rodney works with small business owners helping them write or re-write their business plans, organize their businesses correctly and so much more under the DBA Solve UR Puzzles. He has written several articles on small business development, thinking, and planning. Rodney works with advisers to build their own small business, but also help them build business planning systems for their clients. Rodney has testified in front of the US Congress and Senate committees as well as several state legislatures regarding small business financial issues and has done over ten studies on their affect in the economy and what rules do to small businesses.

Rodney has proven himself as an expert in Advanced Life Insurance strategies, long Term Care, Disability Insurance, and Small Business Solutions. He has spoken across the country in many state legislatures, and at many organizations to be able to provide up to date factual information to better serve you the client. He actively coaches and educates advisers on these complex topics in order to make sure clients get the best service possible.

With his wife of 15 years, Myrta, Rodney also runs 4 nonprofits for physically abused children and battered/trafficked women to give them outlets including running a school for disadvantage children and an international. Rodney also sits on several boards including the NAIFA Texas board, the Red Cross of Austin, Red Cross of Texas, The National DBA Society, International Disability Insurance Society, Insurance Industry Government Regulations, and also the Norwegian Society of Austin Board.

Rodney is very passionate with government issues, having played a large part in refining and improving public education, serving as the Chair for Public Education Reform under Governor Perry seeing large increases in Minority graduation and large decreases in largess spending. Rodney has also worked tirelessly with state and federal leaders to craft legislation favorable to our clients and to us, and helped minimize DOL impacts, and is continuing to work with the SEC to build a more comprehensive and favorable ruling for all. Rodney is the Government/IFAPAC chair for his Local in Austin, is also on the state IFAPAC board, the National Political Action Committee as a regional vice chair, and also sits on our State Board in representing our needs and goals for the locals and also political action and IFAPAC. He is also a HUPAC and Texas PAC contributor.

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