

MEETING AGENDA

smart
Agent System

GAINING
Through
TRAINING

3319 Heritage Trade Drive, Suite 101
Wake Forest, NC 27587

presented by:  **Capmar**TM
Insurance Services

DRESS: THURSDAY OCTOBER 1ST

Business
Casual

7:30am - 8:30am

Breakfast at Training Center

All Meetings in Training Center/Online

8:30am - 8:40am

Sales Congress - Welcome and Kickoff – Terry Register, Aaron Bryson

8:40am - 9:25am

Smart Agent System – *EApp, Prospecting and Client Communications in a Digital World*- Terry Register, Kevin Kilberry

9:25am - 10:10am

Unlocking Power of IUL – *Selling System* - Neil Wilding

BREAK

10:20am – 11:05am

North American - *Clearly Confused* - Gary Proco

11:05am – 11:50am

ILIA – *Exclusive Retirement Strategy for High Income Earners* – David Greene

12:00pm - 1:00pm

Lunch - Training Center/ Online

1:05pm – 1:50pm

Allianz Life - *How Allianz Can Help You Grow Your Business* - Felicia, David Clark

1:50pm – 2:25pm

Annuities Genius - *Reg BI & Form CRS Compliance BD/ Annuities 20/20 - What's Your Vision?* -

BREAK

2:35pm – 3:20pm

Ameritas - *Growth Opportunities Utilizing Ameritas in 2020* - Lance Larsen,

3:20pm – 4:05pm

Columbus Life – *Lirp 401K overlay Benefits to Business Owners* - Ward Carson CLU

BREAK

4:15pm -5:00pm

American National – *One Stop Pension Shop: Pensions Made Easy* - Jonathan Sacks,

5:00pm -5:35pm

Myseniorsnetwork.com - *Senior Markets - Make More, Work Smarter – Residual Income* - Danny Gordon

6:30pm

Reception/drinks

7:00pm

Dinner – TPC Club - Please check your ePacket for table assignment. All invited attendees only.

FRIDAY OCTOBER 2ND

7:30am - 8:30am

Breakfast at Training Center

All Meetings in Training Center/Online

8:30am - 8:40am

Sales Congress - Working Sessions – Terry Register

8:40am - 9:25am

Smart Agent System – *Digital World - Sample Campaigns, bump, eApp, Custom book program* - Terry Register, Kevin Kilberry Aaron Bryson

9:25am - 10:10am

Pacific Life - *The \$12 Trillion Need and How to Close the Gap* - Carlan Snipes,

BREAK

10:20am – 11:05am

Premium Finance and working with CPAs – Terry Register

11:05am – 11:50am

Retirement Analyzer - Steve Ford

12:00pm - 1:00pm

Lunch - Training Center/ Online

1:05pm – 1:50pm

Setting up your Life Department – Jonathan Holland

1:50pm – 2:25pm

Annuities Genius – *Training on Reg BI & Form CRS Compliance BD/ Annuities 20/20 - What's Your Vision?* -

BREAK

2:35pm – 3:20pm

One America – Living Benefits

3:20pm – 4:05pm

Adjourn