

Attendee Registration

2020 Insurance Leaders Forum ATTENDEE REGISTRATION FORM | May 7 & 8, 2020 | NE Innovation Campus, Lincoln, NE

I am a: NAHU Member NAIFA Member Non-Member

First/Last Name _____ Industry Designations _____

Company _____ Email _____

Business Phone _____ Mobile _____

For C.E. Credit:

CFP ID# _____

NPN: _____ Resident State: NE _____ IA _____ Attendee must include license/ID# to receive credit.

Do you plan to attend the Friday 7:15 AM Prayer Breakfast? (\$10 additional fee payable now) YES NO

Registration Fees: Earlybird Registration Deadline: 4/5/20: Member: \$119 Non-Member: \$169
 Regular Registration After 4/5/20: Member: \$149 Non-Member: \$199
 Single Day Ticket – THURSDAY 5/7 ONLY: Member: \$89 Non-Member: \$129
 Single Day Ticket – FRIDAY 5/8 ONLY: Member: \$89 Non-Member: \$129
Total Amount Due: \$ _____

Concurrent Sessions (please select one in each time frame — this will help greatly with CE reporting):

Thursday – 11:00 a.m.: **Michael Hedge, Jr.** - NAIFA Director of Gov Relations & **Beth D. Snyder-Jones, CIC** – NAIFA Ntl Trustee | 1 hour CE
Insurance Issues Update (with NAIFA New Member Benefits Review)

Marcy Buckner, JD – NAHU Vice President of Government Affairs | Current Healthcare Issues | 1 hour CE

Andy Dzurinko, CLU, ChFC | The Power of Optimism | No CE

Thursday – 1:15 p.m.: **Eryka Morehead, CAP, CLTC, LACP** | President & CEO, Collaborative Planning Group |

The Importance of Reviewing Life Insurance Policies | 1 hour CE

Nicole Rossitto-Creamer MS, CEC | Sales & Account Management, BCBSNE | Medicare Fundamentals | 1 hour CE

Scott Wood and Greg Opitz | Executive Business Coaches, Carson Group |

The Critical Art of Building Connection & Brand the Plan | No CE

Thursday – 2:30 p.m.: **Robert B. Wellendorf II, CLU, AEP, CAP** | President, EXECISO | Using Life Insurance in the Business Marketplace | 1 hour CE

Stephen Galasso – Group Sales Manager, National General | Small Group Self-Funding: A Winning Strategy for All | 1 hour CE

Young Professionals Roundtable | Industry Pros, Multiple Roundtables, Lively Discussion |

Topics Every Young Professional Should Talk About | No CE

Friday – 8:30 a.m.: **Thomas L. Petsche, Sr. CLU, ChFC, RHU, DIF, DIA** | Brokerage Solutions, Inc. | Protecting the Business Money Machine: Disability Insurance | 2 hour CE

Ray Hill – VP of Sales | Bend Financial | HSA's- What you need to know! | 2 hour CE

Steve Gilliland | Hide Your Goat: Strategies to Stay

Positive Amongst Negativity | No CE

Friday – 9:30 a.m.: **Thomas L. Petsche, Sr. CLU, ChFC, RHU, DIF, DIA** | Brokerage Solutions, Inc. | Protecting the Business Money Machine: Disability Insurance | (continued)

Ray Hill – VP of Sales | Bend Financial | HSA's- What you need to know! | (continued)

Theron Schaub - VP of Strategic Relations | Loring Ward | Investor and Advisor Survey Insights - What You Need to Know | No CE

ALL CE courses will provide credit for NE & IA insurance, CFP, Legal, CPA & Accounting, pending approvals.

Payment Options: Pay By Check* For credit card payments, please register online.

Email Address For Receipt _____

* Make check payable to NAIFA-NE. Note: When you provide a check as payment, you authorize us to either use information from your check to make a one-time electronic fund transfer from your account or to process the payment as a check transaction. When we process the check, funds may be withdrawn from your account as soon as the same day we receive your payment. You will not receive your check back from your financial institution.

Signed _____ Date _____

Mail completed form to: NAIFA-Nebraska | PO Box 24133 | Omaha, NE 68124 OR FAX TO: 877.355.9226 | **Questions?** Contact Cindy Lilleoien at cindylilleoien@gmail.com or 402.483.4234. Refunds for cancellations before April 15, 2020 may be granted upon written request and decision of conference management, less an administrative fee of \$25. No refunds for cancellations or “no shows” after April 15, 2020; however, you may send a substitute.

FUN-SEEKERS UNITE

Nebraska Insurance Leaders Forum 2020

*Where enthusiasm & education
come together!*



MAY 7-8, 2020

NEBRASKA INNOVATION CAMPUS | LINCOLN, NE

The Forum is THE meeting for Nebraska's top insurance agents & financial services professionals.

REGISTER NOW!

Register before April 6 for EARLY BIRD pricing! Attendance is Limited to the First 400 Registrations!

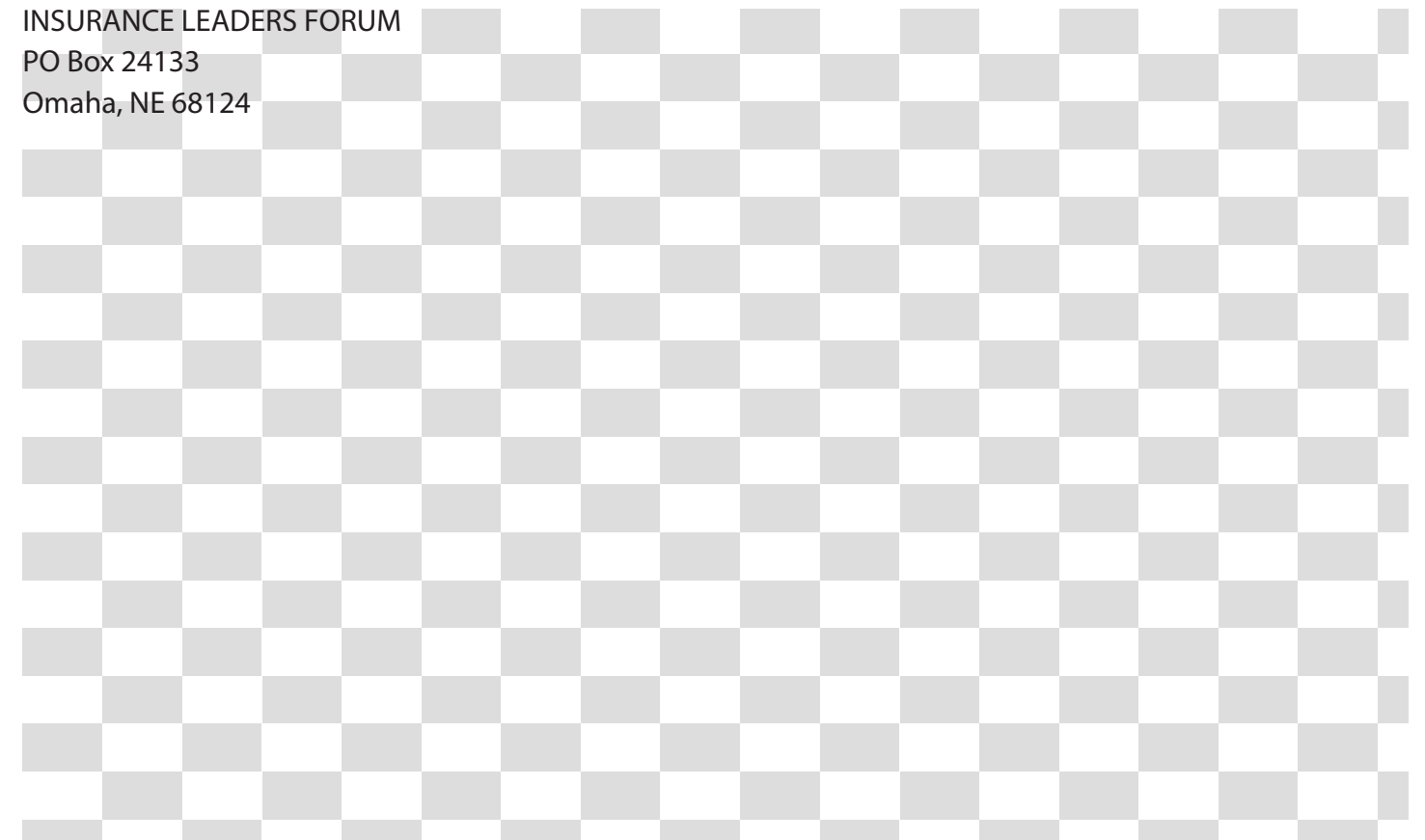
Attend the FULL conference to earn up to 5 hours of CE - PLUS, potentially earn 6 BONUS hours of NE insurance credit.

Visit www.naifanbraska.org OR www.neahu.org

INSURANCE LEADERS FORUM

PO Box 24133

Omaha, NE 68124



2020 Forum Agenda & Details:

THURSDAY, MAY 7

8:00 **CHECK-IN:** light breakfast available, exhibit hall open

9:00 **OPENING GENERAL SESSION**

JUDSON LAIPPLY | Lead Your Evolution

10:30 **MORNING BREAK WITH EXHIBITORS**

11:00 **BREAKOUT SESSIONS**

• **Insurance Issues Update** (with NAIFA New Member Benefits Review)
Michael Hedge, Jr. - NAIFA Director of Government Relations (1 hr CE)
Beth D. Snyder-Jones, CIC - NAIFA National Trustee

• **Current Healthcare Issues** (1 hour CE)

Marcy Buckner, JD - NAHU Vice President of Government Affairs

• **The Power of Optimism** (No CE)

Andy Dzurinko, CLU, ChFC

12:00 **LUNCH IN EXHIBIT HALL**

1:15 **BREAKOUT SESSIONS**

• **The Importance of Reviewing Life Insurance Policies** (1 hour CE)
Eryka Morehead, CAP, CLTC, LACP - President & CEO, Collaborative Planning Group

• **Medicare Fundamentals** (1 hour CE)

Nicole Rossitto-Creamer MS, CEC - Sales & Acct Management, BCBS

• **The Critical Art of Building Connection & Brand the Plan** (No CE)

Scott Wood & Greg Opitz - Executive Business Coaches, Carson Group

2:30 **BREAKOUT SESSIONS**

• **Using Life Insurance in the Business Marketplace** (1 hour CE)
Robert B. Wellendorf II, CLU, AEP, CAP - President, EXECISO

• **Small Group Self-Funding: A Winning Strategy for All** (1 hour CE)

Stephen Galasso - Group Sales Manager, National General Insurance

• **Topics Every Young Professional Should Talk About**

Young Professional's Roundtable, Industry Experts, Multiple Topic

4:00 **AFTERNOON GENERAL SESSION**

THERON SCHAUB | Creating a Better Client Experience with Stories, Sketches . . . and Magic!

5 - 6:30 **RECEPTION WITH EXHIBITORS**

FRIDAY, MAY 8

7:15 am **PRAYER BREAKFAST** Guest speaker Tom Carlson (former NE State Senator and NAIFA Member)

7:30 **CHECK-IN: REFUEL & REFOCUS BREAKFAST**

8:30 **BREAKOUT SESSIONS**

• **Protecting the Business Money Machine: Disability Insurance** (2 hour CE)

Thomas L. Petsche, Sr. CLU, ChFC, RHU, DIF, DIA | Brokerage Solutions, Inc.

• **HSA's- What you need to know!** (2 hour CE)

Ray Hill | VP of Sales, Bend Financial

• **Hide Your Goat: Strategies to Stay Positive Amongst Negativity**

Steve Gilliland

9:30 **BREAKOUT SESSIONS**

• **Protecting the Business Money Machine: Disability Insurance (continued)**

Thomas L. Petsche, Sr. CLU, ChFC, RHU - Brokerage Solutions, Inc.

• **HSA's- What you need to know! - Part 2 (continued)**

Ray Hill - VP of Sales, Bend Financial

• **Investor and Advisor Survey Insights - What You Need to Know (No CE)**

Theron Schaub - VP of Strategic Relations, Loring Ward

11:00 **CLOSING GENERAL SESSION**

STEVE GILLILAND | Enjoy the Ride!

12:00 **EVENT CONCLUDES**

Steve Gilliland | Enjoy the Ride!

A member of the Speaker Hall of Fame, Steve is one of the most in-demand and top-rated speakers in the world. Recognized as a master storyteller and brilliant comedian, he can be heard daily on SiriusXM Radio's Laugh USA and Jeff & Larry's Comedy Roundup. With an appeal that transcends barriers of age, culture and occupation— plus an interactive and entertaining style—Steve shows audiences how to open doors to success in their careers, their relationships and their lives. Presenting to over 250,000 people a year, more than two million have now heard him speak, with audiences encompassing nearly three dozen industries. Steve has the distinction of speaking in all 50 states and in 15 countries.

As one newspaper stated, "Steve is what happens when the humor of a stand-up comic collides with the inspiration of a motivational speaker."



Judson Laipply | Lead Your Evolution

Judson Laipply is an "Inspirational Comedian" combining comedy and content to create the ideal neurological mindset for retention. He is the creator of "The Evolution of Dance" one of the most popular viral videos of all time that has a combined view count of over 500 million across all platforms. Judson graduated from Bluffton University with a BA and from Bowling Green State University with a M.Ed. Combining an amazing ability to make people laugh and think, his presentations are down to earth and highly motivational, creative and appealing, humorous and thought provoking, lively and enriching. Judson has been speaking for over 15 years and has appeared on The Today Show, Inside Edition, Ellen, Oprah, America's Got Talent, and much more. He has spoken to audiences of every type from elementary students to the executive board at NBC and everything in-between.

HOTEL : Hyatt Place Lincoln Downtown

600 Q Street, Lincoln, NE 68508

Rate: \$119 | Deadline: April 15, 2020

Call: 1-888-591-1234 (Reference Code: G-NA12)

Reference group: NAIFA GROUP MAY 2020

Online: naifanebraska.org or www.neahu.org

EXHIBIT HALL HOURS: May 7 | 8:00 am - 6:30 pm.

EVENT APP: Download the Attendify app and search for InsForum2020

FREE WIFI: Network: UNL-Conference
Password to be provided at registration.

Theron Schaub

Creating a Better Client Experience with Stories, Sketches... & Magic!

Leading your clients to 'a-ha' moments of understanding and inspiration is at the heart of our work as financial professionals. But topics like risk, diversification, and factor-based investing can seem difficult to explain. Theron Schaub, Loring Ward's VP of Strategic Relations and professional magician and mind reader, shares new ideas for talking about these foundational topics and investment principals in ways that will surprise even the most seasoned professional.



YOU'LL EARN CE CREDITS

Earn up to 11 HOURS* of Continuing Education for:

- **NE & IA Insurance** • **CPE (Accounting)**
- **CPA** • **CFP** • **CPE (Legal)**

* Attend the **FULL** conference to potentially earn 6 **BONUS** hours of NE insurance credit. See NAIFAnebbraska.org or neahu.org for details.

REGISTER ONLINE NOW:

naifanebraska.org or www.neahu.org