



# 2020 KICK-OFF EVENT!

MARCH 18 - 20, 2020 – PHOENIX, AZ

## EVENT AGENDA & ITINERARY

WEDNESDAY, 3/18/2020

**WELCOME / COCKTAIL RECEPTION**

**6:00PM – 8:00PM**

THURSDAY, 3/19/2020

**BREAKFAST**

**8:00AM – 9:00AM**

**WELCOME & INTRODUCTION**

**9:00AM – 9:15AM**

UNKEFER & ASSOCIATES KICKS OFF THIS EXCITING EVENT.

**MARK EDWARD GAFFNEY**

**9:15AM – 10:00AM**

BOUTIQUE MARKETING, COACHING & CONSULTING SERVICES

**LEADINGRESPONSE (FORMERLY RME360)**

**10:00AM – 10:30AM**

LEVERAGING 24 YEARS OF RESPONSE DATA, WE ARE THE ONLY COMPANY TO USE BOTH TARGETED DIRECT MAIL AND SOCIAL MEDIA MARKETING TO GUARANTEE RESULTS THAT HELP ADVISORS GROW THROUGH MEANINGFUL FACE-TO-FACE PROSPECT ENGAGEMENTS.

**SHORT BREAK**

**10:30AM – 10:45AM**

**BROOKSTONE: TURNKEY ASSET MANAGEMENT**

**10:45AM – 11:30AM**

AN INSURANCE FRIENDLY TURNKEY ASSET MANAGEMENT PLATFORM (TAMP) THAT IS FIDUCIARY BASED AND DESIGNED TO SUPPORT EVERY ASPECT OF AN ADVISORY PRACTICE.



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EXPERT ADVISOR TRAINING

## 2020 KICK-OFF EVENT!

MARCH 18 - 20, 2020 – PHOENIX, AZ

THURSDAY, 3/19/2020 (CONTINUED)

### WHITE GLOVE: SEMINARS & SOCIAL MEDIA

WHITE GLOVE MAKES IT EASY FOR FINANCIAL ADVISORS AND OTHER SERVICE PROFESSIONALS TO SUCCEED WITH EDUCATIONAL SEMINARS AND SOCIAL MEDIA.

11:30AM – NOON

### LUNCH

NOON – 1:00PM

### WEALTH & WISDOM

THE FIRST STEP TO THE NEXT GENERATION OF PLANNING CONCEPTS. CONCEPTS FOR PRESERVING THE FINANCIAL INTEGRITY OF THE FAMILY.

1:00PM – 1:45PM

### SHORT BREAK

1:45PM – 2:00PM

### UNKEFER & ASSOCIATES TEAM PANEL

OUR TEAM DISCUSSES VALUE-ADD OFFERINGS, PRODUCTS, TECHNOLOGY, CASE DESIGN & ALL THE WAYS WE BOOST YOUR BUSINESS.

2:00PM – 2:30PM

### FEDERAL EMPLOYEE BENEFIT ADVISORS

THE INS AND OUTS OF PROVIDING AGENTS AND ADVISERS PROVEN MARKETING STRATEGIES FOR THE FEDERAL EMPLOYEE BENEFIT MARKET.

2:30PM – 3:00PM

### CRACKING THE SOCIAL SECURITY CODE: ANDY ROBERTSON

THE STEPS OF CRACKING THE CODE: HOW TO TURN SOCIAL SECURITY ACTIVITY INTO PRODUCTIVITY FOR YOUR BUSINESS.

3:00PM – 4:00PM

### CARRIER ROUNDTABLE DISCUSSION

ATHENE, NASSAU, NATIONAL WESTERN, F&G, AMERICAN EQUITY AND GLOBAL ATLANTIC DISCUSS TRENDS, PRODUCTS AND SALES STRATEGIES.

4:00PM – 5:00PM

### DINNER PROVIDED BY UNKEFER & ASSOCIATES

6:00PM – 9:00PM



**nextlevel**  
EXPERT ADVISOR TRAINING

**2020 KICK-OFF EVENT!**

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FRIDAY, 3/20/2020

**BREAKFAST**

**8:00AM – 9:00AM**

**WELCOME & INTRODUCTION**

**9:00AM – 9:15AM**

**MARK EDWARD GAFFNEY**

MARK DIVES DEEPER INTO THE CONCEPTS OF MULTIMEDIA MARKETING INCLUDING TV, RADIO, SOCIAL MEDIA, DIGITAL BOOKS AND MUCH MORE!

**9:15AM – 10:00AM**

**SHORT BREAK**

**10:00AM – 10:15AM**

**WEALTH AND WISDOM**

THE FIRST STEP TO THE NEXT GENERATION OF PLANNING CONCEPTS. CONCEPTS FOR PRESERVING THE FINANCIAL INTEGRITY OF THE FAMILY.

**10:15AM – 11:00AM**

**SUREPATH DIGITAL**

HELPING FINANCIAL PROFESSIONALS EFFORTLESSLY GROW THEIR PRACTICE, WE INSTALL A RELIABLE, PROFITABLE MARKETING SYSTEM PROVIDES ALL THE BUSINESS (OR CLIENTS) YOU WANT... WITHOUT WORRY, ANXIETY OR STRESS!

**11:00AM – 11:30AM**

**CLOSING MESSAGE FROM UNKEFER & ASSOCIATES**

**11:30AM – NOON**