



AGENDA

8:00 AM Arrival/Check-in/Refreshments

9:00 AM Welcome

9:15 AM Keynote: Austin Hatch

Overcome It

10:45 AM Kathleen W. Bilderback, JD, LL.M., AEP

Beyond the Basic Buy-Sell: It's More than Just Cross-Purchase or Redemption

12:00 PM Lunch

1:00 PM Educational Breakout Session #1

Ross Bernstein

The Champion's Code: Building Relationships Through Life Lessons of Integrity and Accountability from the Sports World to the Business World

Stuart C. Bear, Esq., Elizabeth C. Henry, Esq., Francis J. Rondoni, Esq.

It's Mine Because Mom Liked Me Best: How to protect the estate plans of clients, family members, and friends from undue influence and exploitation arising from diminished mental capacity

Pete Deavan

Economic Updates and Market Outlook

Dyanne Ross Hanson, CLU, CFP, ChFC, CEPA

Exit Planning: A Guide to the Process

Michael Sir, RHU

How to Be A Highly Effective DI Producer

2:00 PM Dessert Bar

2:15 PM Bryon Holz, CLU, ChFC, LUTCF, LACP

Sowing the Seeds of Love: Building a Legacy through Multigenerational Education and Awareness

3:30 PM Educational Breakout Session #2

Ross Bernstein

Wearing the C: Leadership Lessons from the Greatest Captains and Coaches in Sports

Ron Linneman

Stacked Against Employers and Employees: Why the Health Insurance System is Broken and What Can Be Done About It

Hank Shea, J.D.

Top 10 List: Lessons Learned from White Collar Crime

Cozy Wittman

Significant New FAFSA and Financial Aid Changes

4:30 PM Happy Hour | Networking with Vendors, Beer & Wine Tastings, The Jorgensens Band

6:45 PM Welcome to Dinner

7:00 PM Dinner served

8:00 PM Comedian John DeBoer

9:00 PM Finaroo Goodbye



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