

BUILDING FOUNDATIONS FOR FUTURE GENERATIONS



2018 CAREER
CONFERENCE &
ANNUAL MEETING
MAY 16/17, 2018



Platinum
Sponsor



Gold & Social Hour
Sponsor



Dinner
Sponsor

Bavarian Inn of Frankenmuth



Generations of American diners, lodgers, and tourists have discovered true Bavarian hospitality without crossing an ocean. Here are just a few things you will experience while visiting:

- Stroll through 13 acres of beautiful riverfront
- Listen to the hoof beats of horse-drawn carriages
- Admire architectural gems like our Glockenspiel and authentic wooden covered bridge
- Savor our world-famous meals - family-style chicken dinners and authentic German dishes
- Sample Michigan's greatest selection of German beers
- Enjoy seven acres of family fun at the Bavarian Inn Lodge - including our indoor waterpark with four indoor pools, three whirlpools, and two water slides
- Find the perfect gift in over 40 shops and boutiques

The Fortress Golf Course



The power of nature shaped into one of Michigan's most beautiful golf courses. The Fortress defends itself with oversized greens and challenging bunkers. Located within walking distance of downtown Frankenmuth, The Fortress encompasses 6,800 yards of formidable play on an 18-hole, par-72 course.

Wednesday, May 16, 2018

8:15 a.m. – 9:15 a.m.

Questions Every Client Needs to Answer (1 CE credit)

9:30 a.m. – 11:30 a.m.

Planning for Post-Retirement (2 CE credits, also approved by CFP Board for 3 CE credits)

10:00 a.m. Shotgun Start

Golf Outing at The Fortress – Registration starts at 9:15 a.m.

11:35 a.m. – 12:10 a.m.

Continuing Education Lunch (only for paid CE attendees)

12:15 p.m. – 3:15 p.m.

Regulations and Ethics in the Insurance Industry (3 CE credits, also approved by IMCA for 3 CE credits).

6:30 p.m.

Social Hour in Honor of President-Elect Gregory Kreiner
Sponsored by Guardian/LFG Brokerage

7:30 p.m.

Dinner & Entertainment “The Schuplatters”

8:30 p.m.

2018 Marvin E. Mulenberg, CLU Award Presentation

9:15 p.m.

YAT Hosted Beer/Wine Tasting - Event open to ALL conference attendees

11:00 p.m.

Adjourn

Dress Attire for both days – Business Casual

Thursday, May 17, 2018

7:30 a.m. – 8:20 a.m.

Breakfast Buffet with Exhibitors

8:30 a.m.

Welcome – Gregory Kreiner, State President-Elect

8:35 a.m.

Conference Opener

8:45 a.m.

Speaker: Deirdre Van Nest

How to Build Relationships and Skyrocket Sales

9:35 a.m.

Speaker: Derek Dalling

Michigan Legislative Update

10:00 a.m.

Installation of 2018-2019 NAIFA – Michigan State Officers

10:20 a.m.

Nate Isaacson, Director Social Media, Guaridan

Cold Calling is Dead . . . The Rise of Social Selling

11:05 a.m.

Break with Exhibitors

11:40 a.m.

Door Prize

11:50 a.m.

Closing Speaker: Leon LaBracque, JD, CPA, CFP, CFA

***The Biggest Small Business Tax Change Since Eisenhower:
What You Need to Know***

1:00 p.m.

Adjourn

Dress Attire for both days – Business Casual

Continuing Education Class Descriptions

Questions Every Client Needs to Answer (How to Attract Business)

This is the most popular course to motivate clients into action to address their estate and business planning. Participants will find this course pertinent, insightful and timely to their work. **(1 CE credit)**

Planning for Post-Retirement

The word “senior” is not only associated with freedom from the necessity to work, but also with worries about health care, maintaining one’s life style, and leaving a legacy. Financial advisers often think about helping clients build their net worth and accumulate assets for retirement. Unfortunately, that’s often where advisors stop. Once clients retire, they will rely on their adviser more than ever to solve problems not anticipated in previous years. This course will briefly cover the risks clients face in post-retirement, and offer topics for research which will help advisors distinguish themselves as experts in this often overlooked phase of financial planning.

(2-hour class; also approved by CFP Board for 2 hours)

Regulation and Ethics in the Insurance Industry

Ethics continues to play an important role in the insurance industry. This class covers the basics of industry regulation and the principles of ethical market conduct. It will review industry regulations and how those regulations affect insurance companies and producers. Also discussed are the ethical standards mandated by most states and federal regulations applicable to many agents. The course concludes by discussing agent responsibilities to the insurer.

(3-hour class; also approved by IMCA for 3 hours of CE credit)

Reservations can be made at the Bavarian Inn Lodge by calling 1-855-652-7200. Please give NAIFA – Michigan’s group number 12F2SJ as a reference when calling to get the group rate. Room rates are as follows: \$109.00 standard double room, \$119.00 premium double or king room, \$169.00 per suite, single, double or triple, and quad occupancy per room, per night. There is an additional \$15.00 charge per person for a 5th or 6th person in the same room. Individual reservations are due 30 days prior to arrival.

Speakers

Derek E. Dalling is the President and CEO of Kindsvatter, Dalling & Associates. He joined the firm in 1998 after several years of service as a staff member in the Michigan Legislature. Mr. Dalling began his career in 1995 with the Michigan House of Representatives. At that time, he was the youngest staff member in the House Republican Caucus. His campaign and political knowledge led him to work in one of the most competitive districts.

Legislatively, Mr. Dalling specializes on everything from transportation and environment issues to regulatory and health policy issues to insurance and general business issues and everything in between.

Mr. Dalling and his wife, Erin, a former legislative assistant in the State Senate, reside in Grand Ledge with their daughter, Ashleigh and son, Jonathan. Mr. Dalling earned his B.A. from the University of Michigan and remains an avid Wolverine fan and alumnus.

Nate Isaacson, *Cold Calling is Dead...The Rise of Social Selling.* Nate has played a critical role in advancing the usage of social media in the financial services industry and is a regular speaker at industry events. Under his direction Guardian has won two LIMRA Silver Bowl awards, in 2014 for Best Use of LinkedIn, and in 2016 for Best Use of Social Media by an Advisor. Nate was also recognized by LinkedIn as a Social Selling Influencer at the 2016 LinkedIn Sales Connect.

As Director of Social Media, Nate leads financial professionals to effectively use social selling within their practices to adapt to changes in consumer behavior. Under his leadership he has over 2,700 financial professionals using social media monthly and has created one of the most mature social media programs in all of the financial services industry.

He resides in Seattle with his wife, Christy, Thomas his son, and their miniature long-haired dachshund, Texie. He is a graduate of the University of Washington with a bachelor's degree in Communications and is an avid Husky football fan. Nate actively supports his sister's Bike MS Team, "Team Jody Rae" in memory of his late mother.



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Leon LaBrecque, JD, CPA, CFP, CFA, “The more you know, the more time you can spend enjoying life, rather than worrying.” For Leon LaBrecque, who has been featured in media outlets like Investment News, CNBC, USA Today and Forbes, reducing uncertainty is a theme that runs throughout his professional life. As a practicing attorney, CPA, CFP® and CFA, he is an educator at heart, and has a passion for helping others fully understand their financial lives.

After growing up in Hazel Park, Michigan, graduating magna cum laude from University of Detroit Mercy with degrees in accounting and law, he grew his wealth management firm, LJPR Financial Advisors, from the ground up with a foundation in financial education.

He has authored several books and proprietary financial programs for General Motors, Ford Motor Company, AT&T and numerous law enforcement organizations.

When he’s not helping his clients prepare for a thriving retirement he enjoys spending time with his wife and children, hunting and fishing in Michigan’s beautiful outdoors, and relaxing through yoga and poetry.

Deirdre Van Nest is the creator of the **Crazy Good Talks™ Blueprint**, a system that teaches financial professionals how to build their brands and bring in business through speaking. Most consumers make buying decisions based on emotion and then back their decision up with logic. That’s why if your Advisors want people lining up to work with them after a group presentation or 1:1 meeting, they must know how to speak to their listener’s emotions.

The most powerful way to do that is through storytelling. But... not all stories are created equal. To get great results you must know how to create stories that tap into people’s emotions, make a concise point, and do the selling for you.

Deirdre is an international speaker and trainer, a Certified World Class Speaking™ Coach, a Certified Fearless Living Coach, a contributing author of the Amazon best seller World Class Speaking™ in Action and author of “Fire Your Fear™”. She is an Italian/Irish New Yorker living in Minneapolis where she tries hard not to scare people with her loud voice and enthusiastic hand gestures.



PO Box 530
DeWitt, MI 48820



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NAIFA - Michigan Career Conference & Annual Meeting Registration Form

Selection #1 - \$205.00
Golf, Dinner & Conference

Selection #2 - \$140.00
CE (full day), dinner & conference

Selection #3 - \$110.00
Dinner & Conference

	Qty	Total	Golf Foursome includes (list names)
Selection #1 \$205	_____	_____	1. _____
Selection #2 \$140	_____	_____	2. _____
Selection #3 \$110	_____	_____	3. _____
			4. _____

Early Bird Registration – Register on or before March 5, 2018 and receive a 5% discount off package selections or individual ticket prices. Example: Selection #1 - \$205.00 – 5% = \$194.75

Individual Ticket Prices	Qty	Total
Golf 5/16/18 (\$105.00) Includes: Golf, cart, boxed lunch & 2 drink tickets	_____	_____
Dinner 5/16/18 (\$50)	_____	_____
YAT Event 5/16/18 (No additional charge)	_____	_____
Conference 5/17/18 (\$75) Includes: Conference, Breakfast Buffet & Snack Break	_____	_____
		Subtotal: _____

CONTINUING EDUCATION CLASSES
 \$20.00 for morning classes (includes continental breakfast) _____
 \$30.00 for afternoon class (includes lunch) _____
 • **NON-MEMBERS**, \$35.00 for morning classes or \$60.00 for all classes _____
 • **Registration required to attend CE Classes**

____ **NAIFA Member** **CE TOTAL \$** _____
 ____ **Non-Member** **TOTAL AMOUNT ENCLOSED \$** _____

Name _____ Guest Name _____
 Address _____ Phone _____
 City _____ State _____ Zip _____
 Email Address _____

Payment Information: ____ Check ____ Visa ____ Mastercard ____ American Express

 Credit Card # _____ Exp. Date _____ Signature _____

- **All credit card payments are subject to a 4% processing fee**
- **Registration Deadline April 30, 2018 - No refunds after April 30, 2018**
- **Late registration fee of \$20.00 if registering after April 30, 2018**

Mail registration & payment to:
 NAIFA – Michigan/PO Box 530/DeWitt, MI 48820
 Fax (517) 668-3961
 Email: naifamichigan@yahoo.com