



MEETINGS ON MAIN STREET

About

At NAIFA, our mission is to advocate for a positive legislative and regulatory environment, enhance business and professional skills, and promote the ethical conduct of our members. All NAIFA members adhere to our Code of Ethics and are held to the highest standards in the industry. The Meetings on Main Street event series is our chance to give back to the insurance and financial services industry by presenting an inspirational, insightful, and invigorating experience open to all industry professionals.

Who Should Come

This event is for financial advisors, insurance agents, CPAs, estate planning attorneys, and any other financial service professional looking to grow their business with expert advice from top talent.

Don't miss this great opportunity for networking and learning how to grow your business from leading experts!

This event is free to attend. As a courtesy, please let us know if you RSVP, but then find that you cannot attend.

Agenda Items

Tuesday, July 19, 2022

1:00 pm - 1:15 pm	Registration/Welcome
1:15 pm - 2:35 pm	Jamie Hopkins – Trends in Behavioral Finance and How You Can Capitalize
2:35 pm - 3:00 pm	Daniel Finley – The Solutions Formula: How to Turn Obstacles into Opportunities
3:00 pm - 3:20 pm	Ron Lee – Social Security Simplification
3:20 pm - 3:30 pm	Break
3:30 pm - 3:50 pm	Harlan Accola – Uncovering Wealth in Home Equity
3:50 pm - 4:10 pm	Luke Acree – Branding Using Digital Marketing
4:10 pm - 4:30 pm	Ken Leibow – Become a LinkedIn Power House
4:30 pm - 5:30 pm	Cocktails with Chris Gandy – Inspirational Power Hour



UPCOMING EVENTS

NAIFA's Apex Sales Summit is a new professional development signature event focused on providing top leadership, sales, and marketing ideas to financial services professionals. Apex reflects the concept of a "race to the top" where only the top percent of advisors, and the aspiring top percent of advisors, gather to share and compare success stories. The inaugural Apex event will be held on August 17-18 at the Arizona Biltmore Hotel in Phoenix. Learn more and register at apex.naifa.org.

Register: belong.naifa.org/main-street



MEETINGS ON MAIN STREET

Experience

Join us for an action-packed afternoon featuring talks from insurance and financial services leaders, followed by a complimentary cocktail reception. At Meetings on Main Street, you will hear from nationally-acclaimed speakers and industry leaders, including NAIFA Trustees Jamie Hopkins of Carson Group and Chris Gandy, #1 producer at OneAmerica through his company, Midwest Legacy Group. The half-day program is a free event that NAIFA is providing to members and non-members to promote NAIFA's new programs and initiatives.

You Will Learn:

- Optimize your branding through digital marketing
- Reach more prospects by increasing your visibility on LinkedIn
- Expand your influence in the senior market
- Achieve your potential through time management & leading your team

Featured Speakers



Jamie Hopkins Esq.,
LLM, CFP, ChFC, CLU, RICP
MANAGING PARTNER OF WEALTH SOLUTIONS AT CARSON GROUP

Jamie Hopkins is the Managing Partner of Wealth Solutions at Carson Group, a national wealth management firm that offers coaching and partnership to financial advisors. A nationally recognized writer, researcher, and educator, Jamie is a regular contributor to *Forbes*, *InvestmentNews*, and *MarketWatch*. He has been published in dozens of financial, educational, and legal journals, and he's the media's go-to expert on retirement income planning and tax law.



Daniel Finley
PRESIDENT AND CO-FOUNDER AT ADVISOR SOLUTIONS

Daniel C. Finley is the President and Co-Founder of Advisor Solutions-the Premier Financial Advisors Business Consulting and Coaching Service dedicated to helping Advisors Build a Better Business. His 28+ year successful brokerage career began in 1993 and includes 13 years as a successful financial advisor, as well as over 25,000 plus hours of individual and group coaching sessions coaching financial advisors since 2004.



Ron Lee, CLU, ChFC
VICE PRESIDENT, ADVANCED MARKETS AND BROKERAGE FIELD RELATIONS AT MUTUAL OF OMAHA

At Mutual of Omaha, Ron leads a team of creative, solution-focused advanced markets professionals who collaborate with advisers to provide excellent planning solutions for clients who wish to plan for the succession of their businesses, transfer their estates, or build wealth for a successful retirement.



Luke Acree
PRESIDENT AT REMINDERMEDIA

Luke Acree, President of ReminderMedia and co-host of the popular Stay Paid Podcast, is a marketing evangelist and an expert team builder. Luke has worked with tens of thousands of independent business professionals over the years, helping them understand how to connect with their client database in ways that generate leads, secure repeat clients, and drive more referrals.



Ken Leibow
FOUNDER & CEO AT INSURTECH EXPRESS

As Founder and Chief Executive Officer at InsurTech Express, Ken brings more than 35 years of insurance industry experience, with an extensive background in insurance technology for distribution and back-office systems. Prior to founding InsurTech Express, Leibow worked for Genworth Financial, Mutual of Omaha, and was vice president of operations at Diversified Underwriters Services, Inc.



Christopher Gandy, LACP
FOUNDER OF MIDWEST LEGACY GROUP LLC

Christopher Gandy, is the Founder and Chief Executive Officer of Midwest Legacy Group (OneAmerica) in Lisle, IL. He has served as President of NAIFA's Chicagoland chapter and has been a NAIFA member since 2003. He entered the insurance and financial services industry in 1999 after playing professional basketball for the Chicago Bulls and the San Antonio Spurs as well as in L'Hermaine, France.



Harlan Accola, CRMP, CSA
NATIONAL REVERSE MORTGAGE DIRECTOR AT FAIRWAY INDEPENDENT MORTGAGE CORPORATION

Harlan Accola has been in the mortgage industry for over 20 years and has worked with all types of loans. His specialty and favorite has always been working amongst the 62-plus age group with over 1,000 Reverse Mortgages, which has been the most rewarding part of his career. He is now the National Reverse Mortgage Director for Fairway Independent Mortgage Corporation.



Event Host:
OCi Services

Thank you OCi Services for hosting Meetings on Main Street in Omaha. Charles Olson, II, LUTCF and I part of the Olson family of loyal NAIFA members, is hosting this event at OCi headquarters.

Venue:
OCi Services
4221 North 203rd Street, Suite 200
Elkhorn, Nebraska 8022

Onsite Contact: Emily Cabbage
ecabbage@naifa.org | 319.240.1283

THANK YOU MEMBERS & PARTNERS!



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