

# 2023 NE. INSURANCE LEADERS FORUM AGENDA

## INFORMATION ABOUT CE CREDITS

Attend both days of the Conference and earn up to 6 hours of CE (NE & IA Insurance, CFP, Accounting and PACE). Plus, NAIFA and NABIP members who register for the FULL Conference can earn an additional 6 BONUS hours of Nebraska General insurance CE credit.

\*Please note that members are eligible to receive the 6 bonus hours ONCE each two-year cycle.

## TUESDAY, SEPTEMBER 12

12:00 PM CHECK-IN

12:30 - 3:15 PM ETHICS PROGRAM



### "ETHICS: A PRACTICAL PERSPECTIVE FOR TODAY'S ADVISORS" -- 3 HOURS ETHICS CE

*Jim Boldt CLU, ChFC, LUTCF - Jim Boldt & Associates, LLC*

This three-hour program offers a practical perspective on Ethics for today's financial service professionals. This course will review ethical and professional responsibility in daily and professional life and the importance of ethical conduct in today's financial services industry. The course will also discuss how ethics should be applied to the business practices of financial professionals in an ever-changing financial service industry.

## ONE-HOUR LIFE & HEALTH CE PROGRAMS



### 1:00 - 2:00 PM "HOW TO BECOME A HIGHLY EFFECTIVE DI PRODUCER" -- 1 HOUR LIFE & HEALTH CE

*Mike Sir - OneProtection*

This course will explore the market for individual disability insurance and five strategies to be an effective DI producer.



### 1:00 - 2:00 PM "ESTATE PLANNING FOR FINANCIAL PROFESSIONALS -- 1 HOUR LIFE & HEALTH CE

*Nathan Patterson - Koley Jessen P.C.*

This program is designed to provide insurance and financial service professionals an overview and general understanding of estate planning. The presentation will cover basic elements of estate plans, relevant taxes to consider, common estate planning structures and relevant documents.



### 2:00 - 3:00 PM "EMPOWERING HUMAN HEALTH THROUGH FOOD" -- 1 HOUR LIFE & HEALTH CE

*Susan Rider MS, GBHR, REBC, ASF, CSFS, CHDC - Human Capital Concepts*

This session will provide a crosswalk of ways to incorporate food into your well-being strategy at your agency and at the employer groups you consult as part of their chronic disease management strategies.

\*Presentation will include food sampling so attendees can "taste the rainbow"

3:30 - 4:30 PM OPENING KEYNOTE



### "TAKE OFF THE MASK - IS YOUR LIFE STORY WORTH TELLING?"

*Dan Meers - KC Chiefs Mascot, Speaker, Author*

During this presentation Dan shares some of the valuable lessons he's learned during his long career as a professional mascot. Whether at home, work or in the community, Dan challenges his audience to live each day to the fullest by wisely investing their lives and not just spending them.

4:30 - 6 PM EXHIBIT HALL OPEN / WELCOME RECEPTION WITH SPONSORS

6:30 - 8 PM NAIFA AWARDS DINNER

6:30 - 9 PM AFTERPARTY IN THE HAYMARKET

DAY ONE CONCLUDES

DAY ONE

# WEDNESDAY, SEPTEMBER 13

7:30 AM CHECK-IN / EXHIBIT HALL / BREAKFAST WITH SPONSORS

7:30 AM PRAYER BREAKFAST

## 9:00 AM KICKOFF KEYNOTE



### "THE GAME OF SALES AND HOW TO WIN"

*Chuck Hollander, Jr. - Red Flag Advantage*

Chuck Hollander is an industry insider and knows what it takes to challenge and inspire change in growth minded individuals and organizations. His background as a pioneer, entrepreneur and industry insider combined with his partner's unparalleled background as a retired Admiral, 31-year SEAL and former commander of all SEAL Teams, has positioned his firm with a unique discipline in helping sales professionals to unlock hidden potential and achieve fast and recognizable business outcomes.

## 10:00 AM BREAKOUT SESSION #1



### "LIFE & FINANCIAL SERVICES LEGISLATIVE UPDATE FROM NAIFA" - 1 HOUR LIFE & HEALTH CE

*Mike Hedge - NAIFA*

This program will provide background information and shed light on NAIFA's positions and progress with key Federal Legislative Issues in 2023 and current hot topics that impact insurance and financial services professionals, their business and clients.



### "STATE OF THE HEALTH INDUSTRY ADDRESS FROM NABIP" - 1 HOUR LIFE & HEALTH CE

*Eric Kohlsdorf - President of NABIP*

This program will provide an overview of NABIP's positions and progress with key Federal Legislative issues in 2023 and current hot topics that impact health insurance professionals, their business and clients.

## 11:00 AM BREAKOUT SESSION #2



### "HOW TO BECOME A HIGHLY EFFECTIVE DI PRODUCER" -- 1 HOUR LIFE & HEALTH CE

*Mike Sir - OneProtection*

This course will explore the market for individual disability insurance and five strategies to be an effective DI producer.



### "2023 MEDICARE TRENDS" - 1 HOUR LIFE AND HEALTH CE

*Craig Taylor CLF, MA, DIA, CLTC - Senior Market Sales*

This course reinforces the basic parts of Medicare, why Medicare Supplement insurance is so important and the direction that Medicare, Medicare Supplement and Medicare Advantage is heading in the future.



### "SAVING FOR COLLEGE" - 1 HOUR LIFE CE

*Sara Clegg CFP - Union Bank & Trust*

This program is designed to provide insurance and financial service professionals an overview and general understanding of college savings. This presentation will highlight the importance of college savings as part of a comprehensive financial plan.



### "SOCIAL MEDIA MARKETING" NO CE

*Jordon Scott - Pacific Life*

This workshop will explore various ways to improve your social media and online marketing skills.

## WEDNESDAY, SEPTEMBER 13 (CONT.)

12:00 PM LUNCH WITH SPONSORS / EXHIBIT HALL OPEN

### 1:00 PM BREAKOUT SESSION #3

**"POPULATION HEALTH & TRENDS IN THE INDUSTRY" - 1 HOUR LIFE & HEALTH CE**  
*Medica*

More information to follow



**"EMPOWERING HUMAN HEALTH THROUGH FOOD" -- 1 HOUR LIFE & HEALTH CE**  
*Susan Rider MS, GBHR, REBC, ASF, CSFS, CHDC - Human Capital Concepts*

This session will provide a crosswalk of ways to incorporate food into your well-being strategy at your agency and at the employer groups you consult as part of their chronic disease management strategies.  
\*Presentation will include food sampling so attendees can "taste the rainbow"



**"CASH BALANCE PLANS: WHO IS A GOOD FIT?" -- 1 HOUR LIFE & HEALTH CE**  
*Jordan Scott - Pacific Life*

Cash Balance Plans are a type of tax - qualified Defined Benefit Pension Plan that have increased in popularity in recent years for several reasons. This program will provide a comprehensive overview of Cash Balance Plans, with significant time spent on case design and life insurance in pension plans.

### 2:00 PM CLOSING KEYNOTE



**"HAVING A MAJOR LEAGUE MINDSET"**  
*Andy Neary - Keynote Speaker & Marketing Consultant*

In this closing keynote, Andy Neary will explore the keys to standing out in a crowded market. As an undersized Pitcher, Neary had to "play bigger" every time he took the mound. Your business is no different. Sales is a game of who knows you, likes you, and trusts you. Andy will show attendees how to craft a message and marketing strategy that will have you playing bigger than your competition. Knowledge isn't enough. You must be able to communicate your knowledge effectively.

### 3:00 PM CONFERENCE CONCLUDES

NEBRASKA  
insurance  
leaders  
forum

PRESENTED BY:

NAIFA NEBRASKA ONABIP

**GAME ON**  
THE POWER OF WINNING TOGETHER

SEPTEMBER 12-13, 2023  
NEBRASKA INNOVATION CAMPUS - LINCOLN, NE