NAIFA | Society of FSP Financial Service Professionals | Advanced Practice CENTER

ADVANCED PRACTICE SYMPOSIA

April 28th - Indianapolis | June 9th - Phoenix
September 29th - Philadelphia

Learn more & register:
theapcenter.org

About

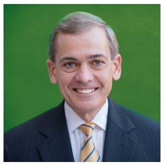
NAIFA and the Society of FSP bring together leading thought leaders in the field of advanced financial planning for a half-day of high-impact presentations and discussions on working with businesses and organizations in 2022.

Featured Speakers

Mark Massey

Vice President, SMA Services, Inc.

Mark Massey is one of the most experienced retirement-planning representatives in the country with more than 30 years in the financial and insurance industry. Prior to accepting this position, Massey served as the National Vice President of Retirement Plans for United Wealth Advisors Group, LLC.



Steve Broadbent

Sr. Vice President - Retirement, Fulcrum Partners

Steve Broadbent's skill in analyzing and collaborating on the design, funding, and security of nonqualified benefit programs for publicly traded or large, privately held corporations is always in high demand. At Fulcrum Partners, he works attentively with each client, carefully designing effective benefits programs to enable organizations to attract and retain key executive talent while building shareholder value. Broadbent has 23 years of targeted financial industry experience, and 11 years with AT&T, of which six were spent as Sales Vice President in Los Angeles. After 22 years of U.S. Navy service, he retired with the rank of commander.

Sam Robert

Vice President - Retirement, Fulcrum Partners

Sam Robert has more than 20 years of financial services experience, much of which has been focused exclusively on executive benefits and nonqualified deferred compensation plans. With comprehensive knowledge of creative plan design and a deep commitment to attentive client care, Robert builds trusted, long-term relationships with clients.

Andrew Rinn, JD, CFP, CLU, ChFC

Vice President Advanced Markets & Competition and Case Design, Ameritas

Andrew Rinn leads a group of credentialed individuals that specializes in placing estate-, business-, and retirement-planning cases. His own expertise includes wealth preservation, estate planning, business planning, and executive benefits. He consults with insurance professionals and clients' tax advisors when appropriate to facilitate sales opportunities.

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Schedule

1:00 - 1:30 pm: Registration Opens

1:30 - 2:30 pm: How, When, and Why to Present a Cash Balance Plan with Mark Massey, SMA Serrvices, Inc.

2:30 - 2:45 pm: Break

2:45 - 3:45 pm: Expanding Your Business Client Opportunities with Nonqualified Benefits with Steve Broadbent & Sam Robert, Fulcrum Partners

3:45 - 4:00 pm: Break

4:00 - 5:00 pm: Opportunities for Business Owners in 2022 & Beyond with Andrew Rinn, JD, CFP, CLU, ChFC, Ameritas

5:00 - 6:00 pm: Cocktail Reception

Cost:
$69 for NAIFA & FSP Members
$99 for Non-Members
$650 per Agency

Register at:
theapcenter.org