

2023 Annual Advisor Conference

Dupont Circle Hotel, Washington, DC

ADAPT, CHANGE, OR DISAPPEAR

Sunday, April 30

3:00 – **Early Bird Session – New Technologies Poised to Change Your Practice:** Dupont Ballroom
 5:00pm **Currence, Corenology, & the Vive Client Portal**
 Vince D’Addona, MSFS, ChFC, CExP, RICP, AEP, *Strategies for Wealth*
 David York, JD, CPA, Managing Partner, *York Howell*
 Luke Bava, Vive Specialist, *Broker’s Service Marketing Group*

5:30 – **Welcome Reception** Glover Park
 6:30pm *Sponsored by John Hancock*

7:00pm **Carrier Dine-Arounds** Local Restaurants

Monday, May 1

7:00 – **Breakfast** Foxhall Rm
 8:00am *Sponsored by Lincoln*

8:00 – **Welcome by AgencyONE Partners** Dupont Ballroom
 8:15am

8:15– **A Carrier CEO’s Perspective on the Changing Landscape of the Financial** Dupont Ballroom
 9:15am **Services Industry**
 Brooks Tingle, President & CEO, *John Hancock*

9:15 – **Adapt, Change or Disappear: New Tools & A New Mindset for a Changing** Dupont Ballroom
 10:15am **Marketplace**
 David York, JD, CPA, Managing Partner, *York Howell*
Sponsored by Symetra

10:15 – **Coffee Break** Foxhall Rm
 10:30am *Sponsored by Mass Mutual*

10:30 – **State of the Financial Services Profession: A Panel Discussion** Dupont Ballroom
 11:30am Moderator - Gonzalo Garcia, CLU, *AgencyONE*
 Panelists - Bill Shelow, CLU, ChFC, CPCU, LLIF, President & CEO, *LIBRA Insurance Partners*
 Lisa Todd, Head of Life & DI Distribution., *Mass Mutual Strategic Distributors*
 Jeff Ricchetti, JD, President, Ricchetti, Inc., *FINSECA*

11:30 – **Changing the Way You Work with Centers of Influence – An Advisor Playbook** Dupont Ballroom
 12:15pm Ralph Adamo, ChFC, CLU, President & CEO, *Integrity Wealth Management*

12:15 – **Lunch Break** Foxhall Rm
 1:00pm *Sponsored by Prudential*

1:00 – **Selling to Promote Efficiency Not to Solve for the Deficiency** Dupont Ballroom
 1:50pm Lucian Ioja, Financial Advisor & Founder, *ORIS Wealth*

1:50 – **The Life Income Plan for Professionals, Business Owners, & Higher Income** Dupont Ballroom
 2:40pm **Wage Earners**
 Christian Kaplan, CFA, Head of Specialty Markets, *Equitable*

2:40 – 3:00pm	Refreshment Break <i>Sponsored by Security Mutual</i>	Foxhall Rm
3:00 – 4:30pm	Bobby Samuelson Like You Have Never Heard Him Before Bobby Samuelson, Executive Editor, <i>Life Product Review</i> & President & CEO, <i>Life Innovators</i>	Dupont Ballroom
4:30 – 5:30pm	Underwriting in the Age of COVID, AI, & Disruptive Industry Change Dennis C. Bartos, Partner & Chief Underwriter, <i>AgencyONE</i> Julie Melendez, Director of Underwriting, <i>AgencyONE</i>	Dupont Ballroom
6:30 – 7:30pm	Reception: Cocktails with Case Managers <i>Reception Sponsored by One America, Symetra, & Annexus</i>	Teddy & The Bully Bar
7:30 – 9:30pm	AgencyONE Hosted Dinner <i>Dinner Sponsored by Protective Life</i>	Teddy & The Bully Bar
Tuesday, May 2		
7:15 – 8:00am	Breakfast Session: Opportunities with Annuities, DI, & Life Settlements Craig Baumgartner, RICP, Annuities Specialist, <i>AgencyONE</i> Paul Mercado, <i>The Eugene Cohen Insurance Agency</i> Drew Grifo & Stephen Ruggieri, Co-Founders & Principals, <i>Commonwealth Capital Brokerage</i>	Foxhall Rm & Dupont Ballroom
8:00 – 9:00am	The Booming Qualified Plan Market Lucas Benson, EA, ACA, MSEA, VP Ops & Sr Enrolled Actuary, <i>SAI Retirement, Security Mutual Life</i>	Dupont Ballroom
9:00 – 10:00am	The Business Owner Market: Turning Hard Assets into Investable Assets & Insurance Opportunities Fletcher Brown, President, <i>Kalamath Consulting Group</i> Mark Householder, SVP Business Solutions, <i>Principal Financial Group</i>	Dupont Ballroom
10:00 - 10:15am	Coffee Break <i>Sponsored by Securian</i>	Foxhall Rm
10:15 - 11:15am	Sunrise or Sunset? Estate Planning as we Approach 2026 Alan Brown, JD, Partner, <i>Hunter Maclean</i>	Dupont Ballroom
11:15 – 12:15pm	An Advanced Markets Potpourri Carly Brooks, JD, CFP, CLU, Head of Advanced Markets Individual Life Operations, <i>John Hancock</i> Brett Berg, JD, LL.M., CLU, ChFC, VP Advanced Planning, Individual Solutions Group, <i>Prudential Financial</i>	Dupont Ballroom
12:15pm	Closing Remarks & Farewell	Dupont Ballroom