



## NBA - BHINI Fall Conference 2022

### *Recruiting or Marketing...Which Comes First?*

Wednesday, October 26, 2022

|                   |                                                                                                                                                                                                             |           |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|
| 7:00 to 8:00 AM   | <b>Business Buzz Breakfast</b>                                                                                                                                                                              | Salon DEF |
| 8:00 to 8:15 AM   | <b>Fall Conference Welcome</b><br><i>Dan Eibner, NBA President</i>                                                                                                                                          | Salon ABC |
| 8:15 to 8:25 AM   | <b>Silver: Retirement Genius</b><br><i>Chris Orestis, President</i>                                                                                                                                         | Salon ABC |
| 8:25 to 8:35 AM   | <b>Silver: BCS Financial/GEO Blue</b><br><i>Bobby Jann, Director, Ancillary Bus. Development, BCS Financial</i><br><i>Don Van Scyoc, VP Individual Sales, Geo Blue</i>                                      | Salon ABC |
| 8:35 to 8:45 AM   | <b>Silver: Gerber Life Insurance Company</b><br><i>Tonya Springer-Taylor, Agency Sales Manager</i>                                                                                                          | Salon ABC |
| 8:45 to 9:45 AM   | <b>Recruiting &amp; Marketing Panel</b><br><i>Bryan Bravo, Proxy Financial</i><br><i>Joanna Bravo, Proxy Financial</i><br><i>Dan Charley, Alpine Brokerage</i><br><i>Carter Graham, Shoreline Financial</i> | Salon ABC |
| 9:45 AM           | <b>Coffee Conversations</b>                                                                                                                                                                                 | Salon DEF |
| 10:00 to 10:45 AM | <b>Diamond: American National</b><br><i>Tom Granata, National Sales Manager</i><br><i>Michael Hardin, National Sales Manager</i><br><i>Craig Klenk, Vice President, Sales</i>                               | Salon ABC |
| 10:45 to 11:15 AM | <b>Diamond: National Life Group</b><br><i>Jake Peck, Key Account Representative, Marketing &amp; Distribution</i>                                                                                           | Salon ABC |

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| 11:15 to 11:25 AM | <b>Silver: Employee Pooling</b><br><i>Steven Lacher, Vice President, Business Development</i>                                                                                                                                                                                                                                                                                                          | Salon ABC |
| 11:25 to 11:35 AM | <b>Silver: SBLI</b><br><i>Kindra Butler Andersen, Vice President, Independent Distribution</i><br><i>Daniel Newberg, Brokerage Sales Director</i>                                                                                                                                                                                                                                                      | Salon ABC |
| 11:35 to 11:45 AM | <b>Silver: I-Pipeline</b><br><i>Christin DeLuzio, Senior Marketing Specialist</i><br><i>Eric Steffensen, Sales Director</i>                                                                                                                                                                                                                                                                            | Salon ABC |
| 11:45 AM          | <b>Lunch of Champions</b>                                                                                                                                                                                                                                                                                                                                                                              | Salon DEF |
| 1:00 to 1:30 PM   | <b>Gold: Transamerica</b><br><i>Eric Rebenkoff, Regional Vice President</i>                                                                                                                                                                                                                                                                                                                            | Salon ABC |
| 1:30 to 2:15 PM   | <b>Diamond: Lincoln Financial Group</b><br><i>Lisa Cox, Senior Underwriter Director</i><br><i>Nick Fournaris, Enterprise Sales Director</i><br><i>Matt Fowler, National Sales Director, Brokerage</i><br><i>Bill Gaffney, Senior Consultant Training &amp; Development</i><br><i>Anthony Harlan, Vice President, National Sales Manager</i><br><i>Sal Sigleski, Regional Sales Director, Annuities</i> | Salon ABC |
| 2:15 to 2:25 PM   | <b>Silver: Insurance Technologies / IXN</b><br><i>Russell Chernugal, Vice President, Strategic Accounts</i><br><i>Lasse Ljung, Vice President, Strategic Accounts</i>                                                                                                                                                                                                                                  | Salon ABC |
| 2:25 to 2:55 PM   | <b>Gold: Columbus Life</b><br><i>Matt Canterbury, Senior Vice President &amp; Distribution Officer</i><br><i>Ben Duhart, Recruiting Coordinator</i><br><i>Sherman Reeves, Vice President Sales, East</i><br><i>Eric Striet, Agency Sales Manager</i>                                                                                                                                                   | Salon ABC |
| 2:55 PM           | <b>Coffee Conversations</b>                                                                                                                                                                                                                                                                                                                                                                            | Salon DEF |
| 3:15 to 4:00 PM   | <b>Distribution's Role In Innovation</b><br><i>Paul Myers, FSA, MAAA, Founder, Xplore Consulting</i>                                                                                                                                                                                                                                                                                                   | Salon ABC |
| 4:00 to 4:30 PM   | <b>Gold: Great Western</b><br><i>Aaron Thompson, Regional Sales Distribution Manager</i>                                                                                                                                                                                                                                                                                                               | Salon ABC |
| 4:30 to 4:45 PM   | <b>Closing Remarks   Housekeeping</b>                                                                                                                                                                                                                                                                                                                                                                  | Salon ABC |
| 6:00 PM           | <b>Welcome Reception</b>                                                                                                                                                                                                                                                                                                                                                                               | Salon DEF |

## Thursday, October 27, 2022

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|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------|
| 7:00 to 8:00 AM    | <b>Business Buzz Breakfast</b>                                                                                                                             | Salon DEF                             |
| 8:15 to 8:45 AM    | <b>AccuPoint</b><br><i>Gary Weber, Founder &amp; CEO, Accupoint Solutions</i>                                                                              | Salon ABC                             |
| 8:45 to 9:15 AM    | <b>Breaking Through the Noise</b><br><i>Bill Gaffney, Sr Consultant Training &amp; Development<br/>Lincoln Financial</i>                                   | Salon ABC                             |
| 9:15 to 9:45 AM    | <b>How Recent Legislation Could<br/>Impact Your Business</b><br><i>Mike Smith, The Brokerage, Inc., Flower Mound, TX</i>                                   | Salon ABC                             |
| 9:45 to 10:45 AM   | <b>BHINI Business Meeting</b><br><i>Closed Session for BHINI Members only</i>                                                                              | Grapevine                             |
| 9:45 to 10:15 AM   | <b>Gold: Pac Life</b><br><i>Steve Moore, Field Vice President, Midwest</i>                                                                                 | Salon ABC                             |
| 10:15 to 10:25 AM  | <b>Silver: Coventry</b><br><i>Ryan Grow, Regional Vice President</i>                                                                                       | Salon ABC                             |
| 10:25 AM           | <b>Coffee Conversations</b>                                                                                                                                | Salon DEF                             |
| 11:00 to 12 Noon   | <b>Breakout – Life</b> moderated by Lee Duncan<br><b>Breakout – Annuity</b> moderated by Dan Charley<br><b>Breakout – Health</b> moderated by Tim Noel     | Salon ABC<br>Colleyville<br>Grapevine |
| 12 Noon to 1:00 PM | <b>Lunch of Champions</b>                                                                                                                                  | Salon DEF                             |
| 1:00 to 1:30 PM    | <b>Cybersecurity</b><br><i>Kyle Ginavan, Chief Executive Officer, OneHQ</i>                                                                                | Salon ABC                             |
| 1:30 to 2:00 PM    | <b>Trusty.Care</b><br><i>Gustavius Smith, Senior Account Executive</i>                                                                                     | Salon ABC                             |
| 2:00 to 2:10 PM    | <b>Silver: Integrity Life</b><br><i>Erik Long, Vice President, Business Development<br/>Christopher Coyne, VP, Insurance Advisor Sales (Goldman Sachs)</i> | Salon ABC                             |
| 2:10 to 2:40 PM    | <b>Gold: Mutual Trust</b><br><i>Kathleen Johnson, Regional Vice President<br/>Kip Walker, Regional Vice President</i>                                      | Salon ABC                             |

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| 2:40 PM         | <b>Coffee Conversations</b>                                                                                                                                              | Salon DEF |
| 3:00 to 3:30 PM | <b>Gold: Athene</b><br><i>Eric Lund, Vice President, Relationship Manager</i>                                                                                            | Salon ABC |
| 3:30 to 4:00 PM | <b>Gold: OneAmerica</b><br><i>Roger Cantu, Regional Sales Director</i><br><i>Matt Clark, Divisional Vice President</i><br><i>Jeremy Veryser, Regional Sales Director</i> | Salon ABC |
| 4:00 to 4:30 PM | <b>Gold: LifeRoc</b><br><i>Brandon Marz, Chief Strategy Officer</i><br><i>John McGinty, Vice President, Sales</i><br><i>Brian Tafaro, Managing Director</i>              | Salon ABC |
| 4:30 to 5:00 PM | <b>Employee Retention Tax Credit 2022</b><br><i>Matt Pearson, Tax Strategy Pro Trawick Financial</i>                                                                     | Salon ABC |
| 5:00 PM         | <b>Closing Remarks   Housekeeping</b>                                                                                                                                    | Salon ABC |

## Friday, October 28, 2022

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|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|
| 7:00 to 8:00 AM   | <b>Business Buzz Breakfast</b>                                                                                                                         | Skyline Ballroom |
| 8:10 to 8:20 AM   | <b>Call To Order   Housekeeping</b>                                                                                                                    | Skyline Ballroom |
| 8:20 to 10:00 AM  | <b>NBA Business Meeting</b><br><b>Election of Officers &amp; Directors</b><br><b>NBA Member Townhall</b><br><i>Closed Session for NBA Members only</i> | Skyline Ballroom |
| 10:00 to 10:15 AM | <b>Adjournment</b>                                                                                                                                     | Skyline Ballroom |