

Building Business Together
 Episode 9
 The Jedi Academy
 4 May 2023

AGENDA



Wednesday, May the Third

3:00 PM	OVERNIGHT GUEST ARRIVALS	
7:00 PM	HOSPITALITY SUITE	Room 301/2

Thursday, May the Fourth *(be with you)*

7:30 AM	SUPER CE	Ballroom
8:30 AM	CHECK-IN BREAKFAST & WELCOME <i>John Florance, Sr Vice President of Marketing, E4 Insurance Services</i>	Ballroom
9:00 AM	JEDI MIND TRICKS: STRATEGIES TO WIN THE CLIENT ACQUISITION WARS. <i>Tiffany Markarian, Managing Director, Advantus Marketing</i>	Ballroom
9:45 AM	THE NEW ORDER: INSURANCE AND ADVISORY POSITIONING FOR MILLENNIALS AND GEN Z <i>Jon Jacobs, Sr Vice President Business Development, LIBRA Insurance Partners</i>	Ballroom
10:25 AM	MORNING BREAK	
10:35 AM	WORKING THE TRADE FEDERATION: OPPORTUNITIES FOR BUSINESS VALUATIONS <i>Natalia Keene, Advanced Markets Counsel, Individual Solutions, Securian Financial</i>	Ballroom
11:15 AM	FORCE PROJECTION: GETTING ADVISORS AND CLIENTS TO ENGAGE ON LTC <i>Shane Van Patten, CLTC Certification in Long-Term Care Instructor, RVP – E4 Insurance Services</i>	Ballroom
12:00 PM	LUNCH BREAK	I.D. Restaurant
1:00 PM	APPLYING THE FORCE: MINIMIZING TAX IMPACTS OF RETIREMENT INCOME STREAMS <i>Michelle Owens, Advanced Markets Consultant, Mutual of Omaha</i>	Ballroom
1:40 PM	JOIN THE REBELLION: CREATING URGENCY IN ADDRESSING PLANNING CONCERNS <i>Karen Hofmann, Vice President, Advanced Planning, Prudential</i>	Ballroom
2:20 PM	AFTERNOON BREAK	
2:30 PM	JEDI COUNCIL – ADVISOR PANEL	Ballroom
3:20 PM	JEDI PEACE-KEEPING: TALES FROM THE FIELD <i>Mike Carr, Executive Consultant, LIFT Consulting, NFL Official</i>	Ballroom
4:20 PM	CLOSING REMARKS <i>Dan Peterson & Brendon DeRouin, Managing Partners, E4 Insurance Services</i>	Ballroom
4:30 PM	MOS EISLEY REDUX – COCKTAIL RECEPTION <i>"You will never find a more wretched hive of scum and villainy. We must be cautious." – Obi Wan Kenobi</i>	Cushing Room
7:00 PM	HOSPITALITY SUITE	Room 301/2

