

Savvy Advisor Solutions: SOAR TO SUCCESS

Fargo Air Museum
September 28, 2023



E4
INSURANCE
SERVICES

AGENDA

When	What	Who
08:00	Doors open/Check-in	Please visit our sponsor's tables!
08:30	Take-off/Welcome	Dan Peterson, LLIF, LUTCF, FIC President & Managing Partner, E4IS
08:45	Creative Uses of Annuities	Dan Peterson, LLIF, LUTCF, FIC President & Managing Partner, E4IS Bryant Hunter, Regional Sales Director, National Western Jacob Richter, Vice President IMO Annuities, Nationwide.
9:45	15-Minute Break	
10:00	A Fresh Look at Long-Term Care	Shane Van Patten, CLTC RVP, E4 Insurance Services Special thanks to OneAmerica
11:00	Disability Income Opportunities with Business Planning	Brady Serold SVP - Disability Income, E4IS Courtney Hanson, Regional Vice President, Principal.
12:00	1-Hour Lunch	
13:00	Tools to Teammates: Cognitive Augmentation in the 21st Century.	Col. Dan "Animal" Javorsek (USAF, Retired) Chief Technology Officer, EpiSci Special thanks to Lincoln
14:00	Help Your Clients Begin to Plan Their Legacy	Steve Walker, CLTC, LUTCF VP - Institutional Accounts, E4IS Adam Wall, Regional Vice President, Protective Brad Mills, Regional Vice President, Symetra.
15:00	15-Minute Break	
15:15	Estate Planning Legal Panel	Jessica Foss , Fredrikson & Byron, PA John Williams , Fredrikson & Byron, PA Susan Johnson-Drenth , JD Legal Planning Tim Richard , Serkland Law Firm Toni Sandin , Sandin Law Ellie Steffes , Sandin Law
16:15	Landing/Closing Remarks	Dan Peterson, LLIF, LUTCF, FIC President & Managing Partner, E4IS
16:30	Social & Museum Activities	Enjoy the Fargo Air Museum!

Thank you to our generous sponsors!

