

2016 NAIFA/NEAHU FORUM

REGISTRATION PACKET



2016 INSURANCE LEADERS FORUM
all roads lead to kearney in 2016

SPECIAL MEMBER EARLYBIRD REGISTRATION RATE:
\$124 if you are a member of NAIFA-Nebraska and/or NeAHU if registered by March 1, 2016.



April 7-8 • Younes Conference Center • Kearney, NE

Join Us Wed, April 6 at 7:00 pm for a Kickoff Party at the Archway Museum

Featured Speakers Include:

AVIK ROY

- SENIOR FELLOW AT THE MANHATTAN INSTITUTE
- OPINION EDITOR AT FORBES
- 2012 HEALTHCARE POLICY ADVISER TO MITT ROMNEY
NBC's Chuck Todd, on Meet the Press, described Roy as one "of the most thoughtful guys that [has] been debating" health care reform. He is the author of *Transcending Obamacare: A Patient-Centered Plan for Near-Universal Coverage & Permanent Fiscal Solvency*.



SHAWN EICHORST

- DIRECTOR OF ATHLETICS AT THE UNIVERSITY OF NEBRASKA
Eichorst leads 24 intercollegiate teams, 600-plus student-athletes & more than 300 employees. Eichorst speaks about his primary mission to lead Athletics in providing student-athletes with resources & support they need to be successful in academics, athletics & life. He serves on the Chancellor's Senior Administrative Team & regularly works with campus administrators & deans.



ED DEUTSCHLANDER

- CEO AT NORTH STAR RESOURCE GROUP
North Star is one of the nation's largest & oldest privately-held independent financial advising firms. Ed will present a bonus pre-conference session "Success Begins with You" based on concepts in his book, a keynote on the Agent's Role Today & Tomorrow, & will present to leaders in all levels of management on issues, challenges & topics important to them.



Why attend the 2016 Forum?

"You can't afford to miss this opportunity to truly learn from the best.

Whether it's the tremendous lineup of speakers including one of my favorites, Fox News contributor and Health Care expert Avik Roy, or the hundreds of successful peers in attendance. I know I'll walk away with something to implement in my business immediately. That's why missing the 2016 Insurance Leaders Forum isn't even a consideration for myself or anyone that takes this business seriously."

~ Charles Olson, II, Omaha, NAIFA & NAHU member

"Your purpose defines your practice. When you know your purpose, your best years are always ahead of you. Industry icon Ed Deutschlander, CLU, CLF will share valuable information on how to 'Practice on Purpose'.

I can't think of a better way to sharpen your saw than by attending the 2016 FORUM in Kearney."

~ Dave Tuzson, Scottsbluff, NAIFA-Nebraska President

Premier Sponsors:



REGISTRATION FORM ON THE BACK
OR REGISTER ONLINE: www.LearningWithTheBest.com

2016 INSURANCE LEADERS FORUM Schedule

WEDNESDAY, APRIL 6

Afternoon: **Optional golf outing at Awari Dunes.** For more information, Lori Gartner: (308) 698-0150, lori.gartner@wfadvisors.com

7-8:30 pm: "ADVISORS AT THE ARCH" – OPENING NIGHT KICK-OFF EVENT

Join colleagues and conference speakers for a tour, cocktails & desserts at Kearney's Archway Museum. Pre-register, separate ticket required.

9:00 pm: **Hospitality rooms at hotel**

THURSDAY, APRIL 7

6:45-7:45 am **PRAYER BREAKFAST WITH JOHN GUSTAFSON** (Fairfield Inn, Rm 1, limited seating, pre-register.)
John Gustafson, Lincoln, NE, author of *The Lord is Coming, Are You Ready, A Story of Life Insurance and Life Assurance.*

7:00 **REGISTRATION & COFFEE WITH EXHIBITORS**

8-8:45 **BONUS PRE-CONFERENCE SESSION** (Limited seating, pre-register.)
Success Begins With You – Ed Deutschlander, Minneapolis, MN
Presentation based around concepts in his book, followed by interactive audience Q&A.

9:00 **OPENING GENERAL SESSION**
The Agent's Role(s) Today & Tomorrow—Ed Deutschlander - The brutal facts on where the industry is going, what consumers & clients can expect, how to stay relevant with practical tips on staying relevant in the future.
The Traci Wickham Story - Traci Wickham, Columbus, NE, was nearly killed before Christmas, 2012, when her minivan was T-boned by a semi. Hear her amazing story of recovery & the role insurance played.

10:30 **BREAK WITH EXHIBITORS**

10:30-12:00 **FIELD LEADER FORUM BREAKOUT**
Jules Gaudreau, Wilbraham, MA & Ed Deutschlander, Minneapolis, MN
This breakout is beneficial to all levels of agency leaders. Discuss relevant management issues & challenges.

11:00 **GENERAL SESSION**
Becoming a Client Advocate: 2013-2014 NAHU President Tom Harte, Hampstead, NH & 2015-2016 NAIFA President Jules Gaudreau, Wilbraham, MA with J.J. Green, moderator, Grand Island, NE
A professional agent/broker is an advocate not only for clients as it relates to financial services solutions, but also for regulatory & legislative issues affecting a client's ability to achieve financial independence.

12:00 **LUNCH IN EXHIBIT HALL**

1:30 **CONCURRENT SESSIONS** — choose one (all CE sessions pending approval)
• **Dean M. Hoffman - Self-Funding: Basic and Advanced Strategies** (2 hours Health CE, continues at 2:30 pm)
This 2 hour session is geared towards Agents, Brokers, Consultants & support staff regarding self-funding group health plans.
• **Sarah J. Kaelberer, CFP®, CLU, ChFC— It's All in the Questions** -The power of discovery & building relationships.
• **Roger Seip – Train Your Brain for Success**
Learn to harness the creative capacity of your mind & achieve your personal best, professionally, financially & personally.
• **Matt Ottemann – Using Life Ins to Protect a Family's Hopes and Dreams** (1 hour CE)
The proven power of 4 life insurance strategies is helping parents navigate the issues they face in securing a successful family legacy.

2:30 **CONCURRENT SESSIONS** — choose one (all CE sessions pending approval)
• **Dean M. Hoffman continues Self-Funding: Basic and Advanced Strategies**
• **Sarah Kaelberer, CFP®, CLU, ChFC—It's the Little Things That Count** - By paying attention to the little things, & knowing how they're connected, you can build a sales & service process that leads to consistent referrals.
• **Roger Seip –Train Your Brain for Success** (repeat of 1:30 session)
• **Nick Niemann – Using Life Ins. to Work in Achieving a Business Owner's 4th Quarter Success**
Learn how life ins. creates value in achieving a successful 4th quarter for business owners, their families & companies.

3:30 **BREAK IN EXHIBIT HALL**

4:00 **GENERAL SESSION**
Adapting to Change - Speakers from a variety of professional backgrounds share relevant tips in a 'Ted Talks' format followed by facilitated roundtable discussion & cash bar.
• **Sarah M. Kaelberer**, President, Business & Estate Advisers, Inc.
• **Roger Seip**, CEO, Freedom Personal Development
• **Avik Roy**, Senior Fellow, Manhattan Institute
• **Doug Kristensen**, UNK Chancellor
• **Michael Schnieders**, CEO & President, CHI Health Good Samaritan, Kearney
• **Tom Harte**, 2013-2014 NAHU President

5:15 **RECEPTION WITH EXHIBITORS IN EXHIBIT HALL**

Evening **HOSPITALITY ROOMS**

FRIDAY, APRIL 8

7:00: **OPTIONAL EARLYBIRD SESSIONS**
(pick one)

Jesse Patton – Affordable Care Act-What do I have to do Now? 1 hour CE, pending
Get comprehensive details on the current status of the ACA.

Practice-Building Forum – NAIFA leaders share tips you can use to grow your practice in a series of 'Ted Talks.'

- **Dave Tuzson**
- **Jules Gaudreau**
- **Chuck Olson**
- **Terry Headley**

8:00 **Coffee & networking break**

8:30 **GENERAL SESSION**

Avik Roy, Senior Fellow, Manhattan Institute – Health Care Policy in the U.S.
The Forbes Magazine opinion editor & political policy advisor shares perspectives/ ideas, which have been called the most thoroughly developed alternative for reforming U.S. health care in the wake of the ACA.

Steve Martin, CEO, Blue Cross Blue Shield, Omaha, NE Health Insurance for Tomorrow
Get top-level insight on the future of NE health insurance marketplace and the implications for agents, brokers, & consumers.

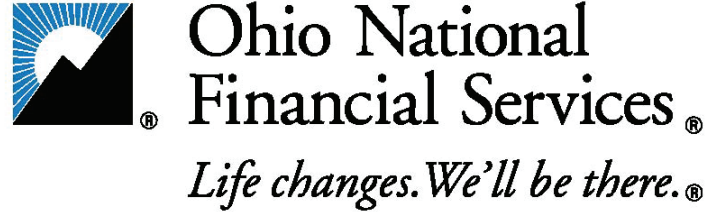
Shawn Eichorst, Athletic Director, University of Nebraska
"What does it take to lead?"

Andy Hoffman, Atkinson, NE -- Light Yourself on Fire
Andy Hoffman's life was turned completely upside down in 2011 when his son Jack suffered a nearly fatal seizure which he later learned was pediatric brain cancer. He will share his passion for the disease & his family's remarkable experiences, including the Jack Foundation.

Noon **Adjournment**

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Hotel Information

The Insurance Leaders Forum
suggests the following
accommodations in Kearney, NE.

LaQuinta Inn: \$99.95/Suites \$129.95
108 3rd Avenue, Kearney, NE
308-237-4400

*The LaQuinta Inn is currently undergoing remodeling, which will be completed in March.
If you call LaQuinta, leave a message and they will return your call to book your room.*

Fairfield Inn: \$99.95/Suites \$129.95
501 Talmadge Rd, Kearney, NE
308-236-4200

Both room block rates will end
on March 15, 2016.

2016 Insurance Leaders Forum Attendee Registration Form

I am a: ☐ NAHU Member ☐ NAIFA Member (LOCAL: _____) ☐ Non-Member

First/Last Name _____ Industry Designations _____

Company _____ Email _____

Address _____ City _____ State _____ Zip _____

Business Phone _____ Mobile _____

How did you hear about the Forum? _____

If seeking C.E. Credit, please check State Insurance C.E. needed: ☐ Nebraska ☐ Iowa

National Producer Number (for C.E. credit) _____

Registration Fees: Super Earlybird Registration Deadline: 3/1/16: ☐ Member: \$124 ☐ Non-Member: \$174

Earlybird Registration Deadline: 3/15/16: ☐ Member: \$149 ☐ Non-Member: \$199

Regular Registration After 3/15/16: ☐ Member: \$169 ☐ Non-Member: \$219

Optional Wed Night Kickoff Reception, Archway Museum, 7:00-8:30 pm: ☐ \$20

Total Amount Due: \$ _____

Choose Additional Options:

☐ Thu Morning Prayer Breakfast, Fairfield Inn, limited seating, pre-register, \$5 payable at hotel

☐ Thu Bonus Pre-Conference Session "Success Begins with You," Ed Deutschlander, limited seating, no additional fee

Concurrent Sessions (please select one in each time frame — this will help greatly with CE reporting):

Thursday – 1:30 p.m.: ☐ Dean M. Hoffman: Self-Funding: Basic and Advanced Strategies (2 Hr Health CE)

☐ Sara Kaelberer: It's All in the Questions

☐ Roger Seip: Train Your Brain

☐ Matt Ottemann: Using Life Ins. To Protect a Family's Hopes & Dreams (1 Hr Life CE)

Thursday – 2:30 p.m.: ☐ Dean M. Hoffman continues (Health CE) ☐ Roger Seip: repeat of 1:30 session

☐ Sara Kaelberer: Picking up the Paper Clips, It's the Little Things That Count

☐ Nick Niemann: Using Life Ins. To Achieve a Business Owner's 4th Qtr. Success (1 Hr Life CE)

Friday – 7:00 a.m.: ☐ 7:00 a.m. Jesse Patton: ACA Update (1 Hr Health CE)

☐ Practice Building Forum w/NAIFA Leaders

All CE courses have been filed with the NE Dept. of Insurance and are pending approval.

Payment Options: ☐ VISA ☐ Mastercard ☐ American Express ☐ Discover ☐ Paying By Check*

Name on Card _____

Card Number _____ Exp Date _____ Sec Code _____

Billing Address of Card _____

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* Make check payable to NAIFA-NE. Note: When you provide a check as payment, you authorize us to either use information from your check to make a one-time electronic fund transfer from your account or to process the payment as a check transaction. When we process the check, funds may be withdrawn from your account as soon as the same day we receive your payment. You will not receive your check back from your financial institution.

Signed _____ Date _____

Mail completed form to: NAIFA-Nebraska • 1633 Normandy Court, Suite A • Lincoln, NE 68512

OR FAX TO: 402-476-6547 • **Questions?** Email Erin@LearningWithTheBest.com or call Erin at 402-690-1624

Refunds for cancellations before April 1, 2015 may be granted upon written request and decision of conference management, less an administrative fee of \$25. No refunds for cancellations or "no shows" after April 1; however, you may send a substitute.