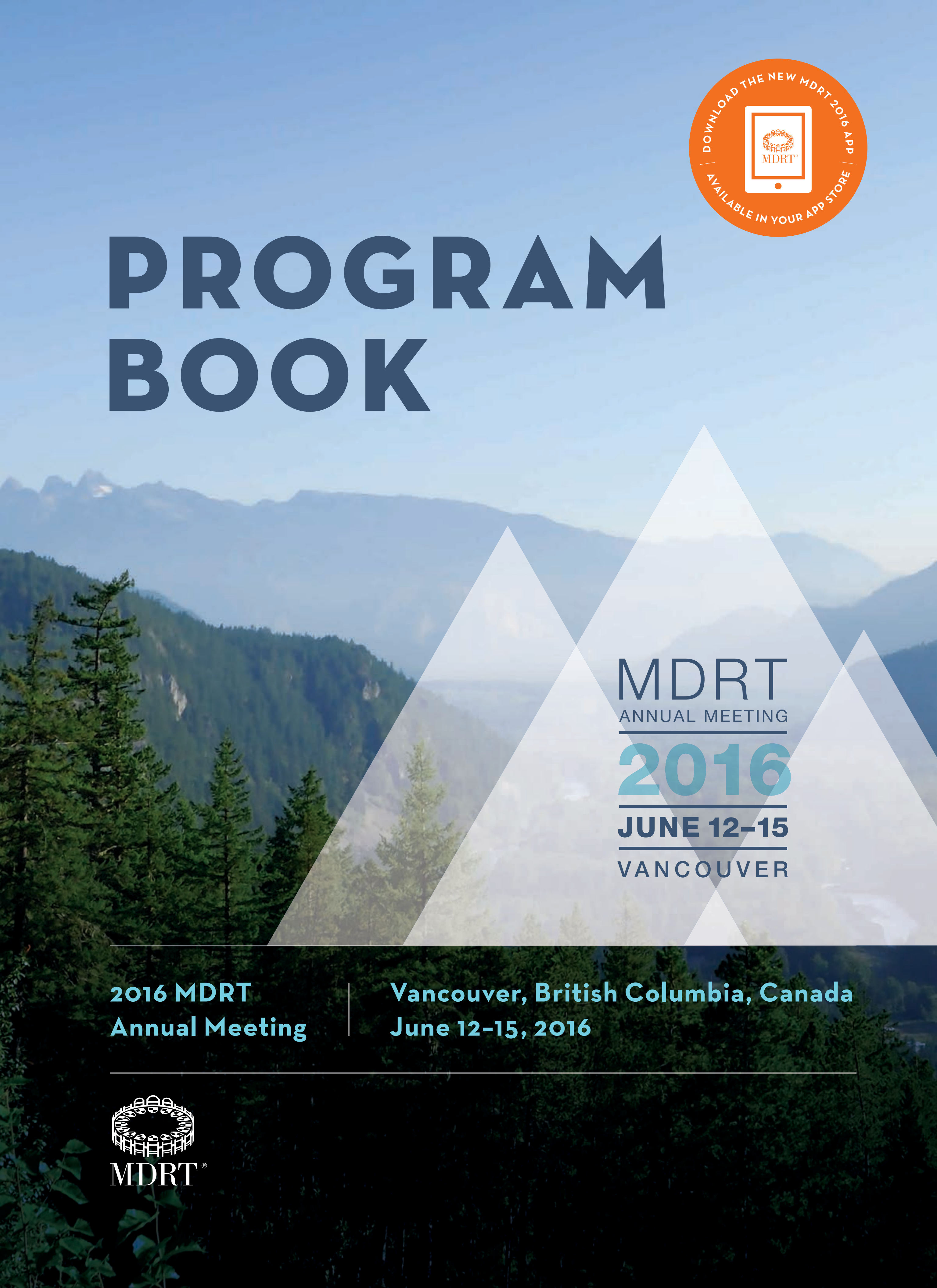


DOWNLOAD THE NEW MDRT 2016 APP

AVAILABLE IN YOUR APP STORE

PROGRAM BOOK

MDRT
ANNUAL MEETING
2016
JUNE 12–15
VANCOUVER

2016 MDRT
Annual Meeting

Vancouver, British Columbia, Canada
June 12–15, 2016

MDRT®

TABLE OF CONTENTS

WELCOME TO VANCOUVER AND THE 2016 MDRT ANNUAL MEETING!

DISCOVER INNOVATIVE IDEAS

DEAR MDRT MEMBERS AND GUESTS

Welcome to the 2016 Million Dollar Round Table Annual Meeting and the beautiful city of Vancouver! No matter how successful you are, there's always room for improvement, and the Annual Meeting is the place to collaborate with the best in the profession to inspire growth in your business. You will hear incredible stories from our Main Platform speakers, learn innovative ideas from some of the best minds in the world and share best practices with peers.

We have an exciting meeting planned with some tremendous speakers and sessions. Inside this program book is a schedule for each day, a map to help you locate key areas throughout the Convention Centre, and detailed information on presentations and speakers. There is also a tab for the ConneXion Zone® with a daily schedule, speaker index and sponsor and exhibitor information.

In addition to Main Platform, there are many options to learn, including Focus Sessions, MDRT Speaks, Cornerstone Presentations, Echo Sessions and Idea Exchanges. There is a lot to choose from, so I encourage you to attend the "Meet Your Meeting" sessions taking place Sunday, June 12, in the ConneXion Zone®, where you will learn more about the new schedule and everything you can take advantage of over the next few days.

I hope you will join me at the new Opening Ceremony on Sunday, June 12, from 5 to 6:30 p.m. to celebrate the rich tradition of MDRT and to kick off the 2016 Annual Meeting. The Opening Ceremony will include the MDRT flag ceremony, Moment of Reflection and spectacular entertainment — it is sure to be a memorable experience.

On behalf of the Executive Committee, thank you for attending this year's Annual Meeting and have a wonderful time in Vancouver!

All the best,

Brian D. Heckert, CLU, ChFC
2016 President
Million Dollar Round Table

MDRT EXECUTIVE COMMITTEE

Brian D. Heckert, CLU, ChFC, of Nashville, Illinois, is the President of MDRT. He is a 28-year MDRT member with seven Court of the Table and nine Top of the Table honors. He is a Legion of Honor Excalibur Knight of the MDRT Foundation and a member of its Inner Circle Society. His Round Table volunteerism includes speaking at the Annual Meeting and MDRT Experience and Global Conference, as well as service on multiple MDRT committees and task forces. He served on the MDRT Foundation Board of Trustees for three years and was Divisional Vice President three times. Heckert is the founder and managing member of Financial Solutions Midwest LLC, a financial planning firm focused on creative retirement plan design and income distribution planning.

Caroline A. Banks, FPFS, of London's West End, is the MDRT Immediate Past President and a 27-year MDRT member with 22 Top of the Table honors. She is managing director of Caroline Banks and Associates, one of the first firms in the U.K. to be recognized with the prestigious Chartered Financial Planning designation. Banks is active in the New Model Adviser movement in the U.K., and her firm was awarded inclusion in Citywire's Top 100 Advisers in 2013 and 2014, which recognizes outstanding achievements in the U.K. financial advice community. Banks is an active volunteer for the MDRT Foundation, achieving Diamond Knight status, and was presented with the Quality of Life Award for her work in assisting the PSP Association in battling progressive supranuclear palsy (PSP).

Mark J. Hanna, CLU, ChFC, of Concord, California, is the First Vice President of MDRT. He is a 28-year MDRT member with three Court of the Table and 17 Top of the Table honors, serving in 2007 as Chair of Top of the Table. He is also a Royal Order Excalibur Knight of the MDRT Foundation and a member of its Inner Circle Society. Hanna is chairman of Hanna Global Solutions, an employee benefits advisory and administration firm providing global human resource management solutions, and CEO of Hanna Insurance and Financial Solutions Inc., a firm specializing in executive compensation and legacy planning. His Round Table service is extensive, with service on multiple committees and task forces. He has served on many local, state and national boards of directors, including as president of both the Golden Gate and East Bay Chapters of the Society of Financial Service Professionals, president of the National Association of Insurance and Financial Advisors (NAIFA)–San Francisco, and as a member of the National Board of Directors of The Society of Financial Service Professionals.

James Douglas Pittman, CLU, CFP, of Portland, Oregon, is Second Vice President of MDRT. He is a 42-year MDRT member with 16 Court of the Table and four Top of the Table qualifications. He is also a Diamond Knight of the MDRT Foundation and has served on its Board of Trustees. Pittman is founder and president of Insurance Consulting Services Inc., an affiliate firm of M Benefit Solutions. In 2009, he was honored with the prestigious Bud Horn award from the Oregon Association of Insurance and Financial Planners. He is the past president of the Estate Planning Council of Portland and the Portland Chapter of CLU and ChFC.

Ross Vanderwolf, CFP, of Fortitude Valley, Queensland, Australia, is Secretary of MDRT. He is a 29-year MDRT member with nine Court of the Table and six Top of the Table qualifications and a Diamond Knight of the MDRT Foundation. Vanderwolf, a 34-year industry veteran, is managing director of Rothgard Financial Partners, a full-service financial planning practice. Vanderwolf served on the Finance Committee and MDRT Foundation Board of Trustees. He is a three-time nominee for the Association of Financial Advisers' Adviser of the Year. In addition, he was awarded AXA Financial Advice Network's State Adviser of the Year in 2002 and 2007, and National Adviser of the Year in 2007.

KEY AND MAPS

General Event Icons

⊘ No Translation

🎫 Ticketed Event

🏷 Admission restricted to badges

Prepaid Events: Ticket required for admission. Admission is restricted to badge-wearing meeting attendees who purchased a ticket in advance.

CC:W Convention Centre: West

CC:E Convention Centre: East

Focus Session Icons

Location-Specific Topics

🌐 Global

🇺🇸 U.S.

Translation Language

- 🎧 Cantonese
- 🎧 Hindi
- 🎧 Japanese
- 🎧 Korean
- 🎧 Mandarin
- 🎧 Spanish

Content Tracks

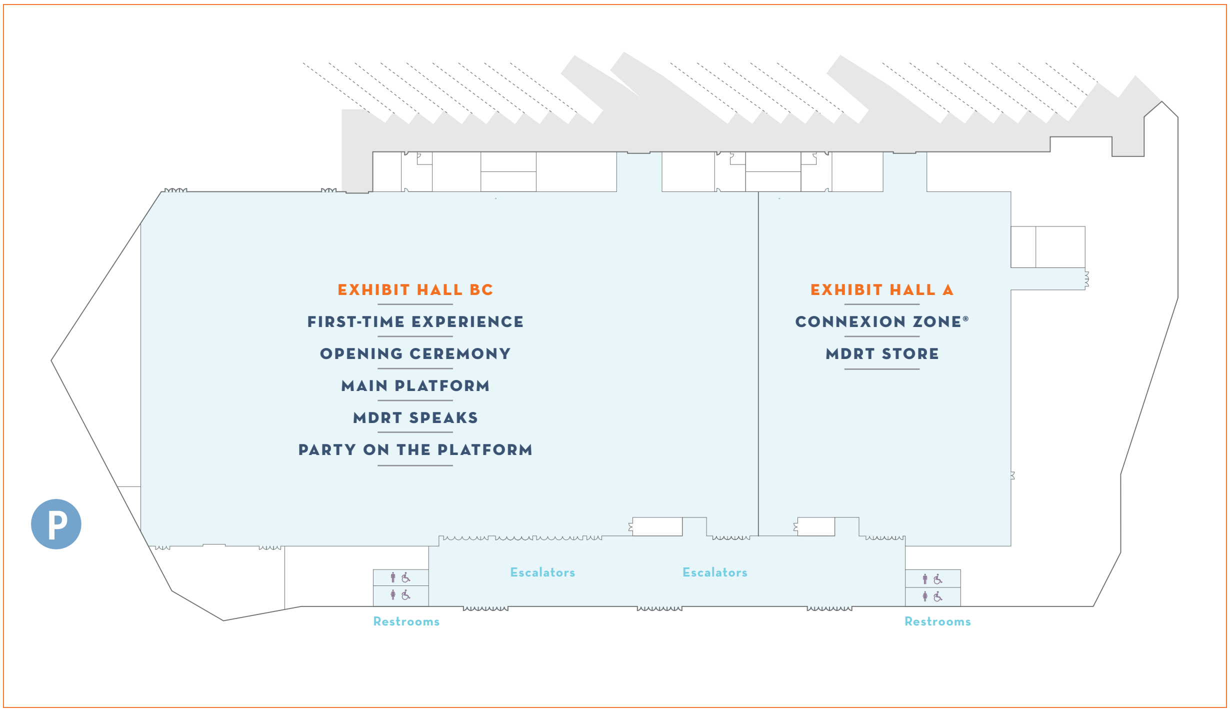
- Client Strategies
- Marketing
- Practice Management
- Protection
- Top of the Table
- Retirement/Wealth Planning Strategies
- Whole Person

VANCOUVER AREA MAP

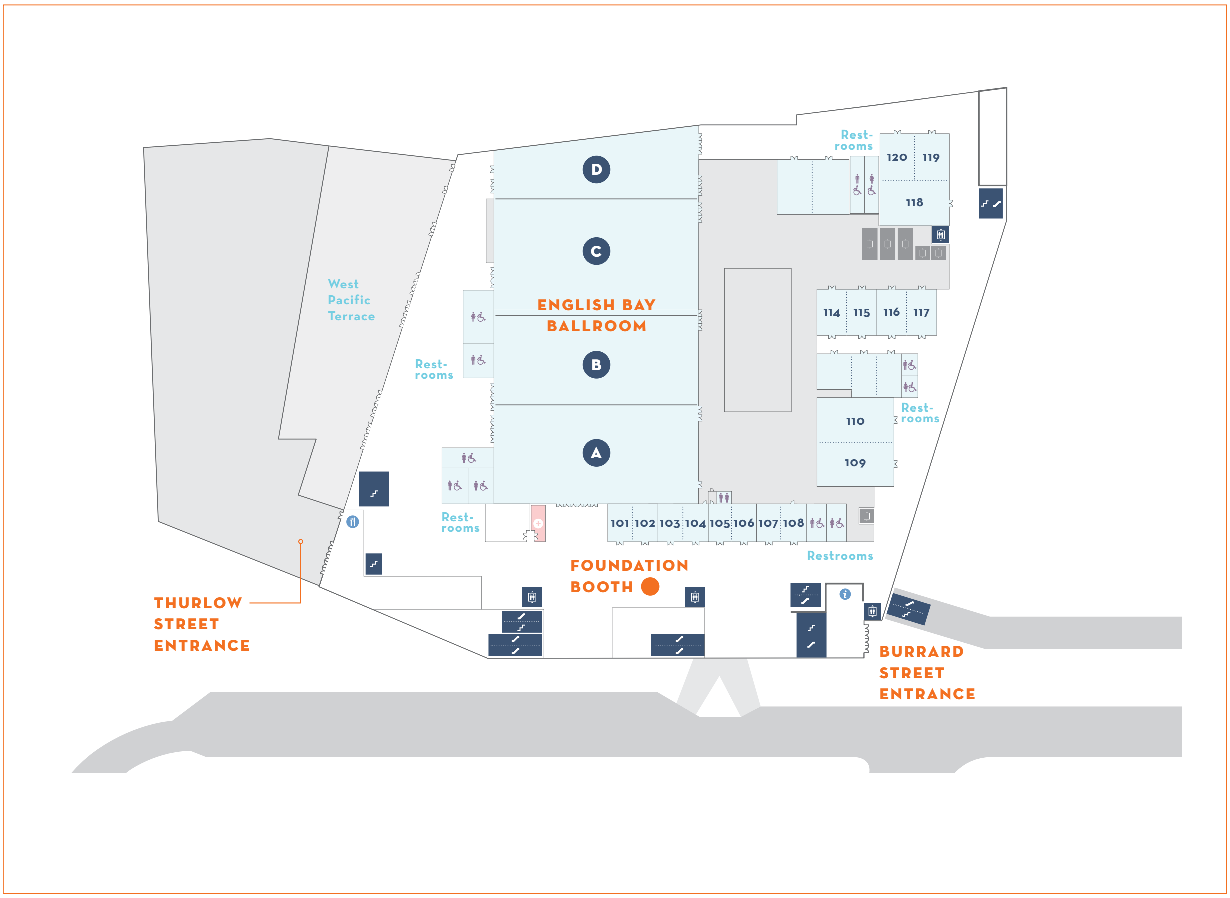
1. *The Fairmont Waterfront* (Co-headquarter hotel)
2. *Pan Pacific Vancouver* (Co-headquarter hotel)
3. *The Fairmont Hotel Vancouver*
4. *Four Seasons Hotel Vancouver*
5. *Hyatt Regency Vancouver*
6. *Pinnacle Hotel Vancouver Harbourfront*
7. *Rosewood Hotel Georgia*
8. *The Sutton Place Hotel*
9. *Vancouver Marriott Downtown*

VANCOUVER CONVENTION CENTRE-WEST

West Exhibition Level

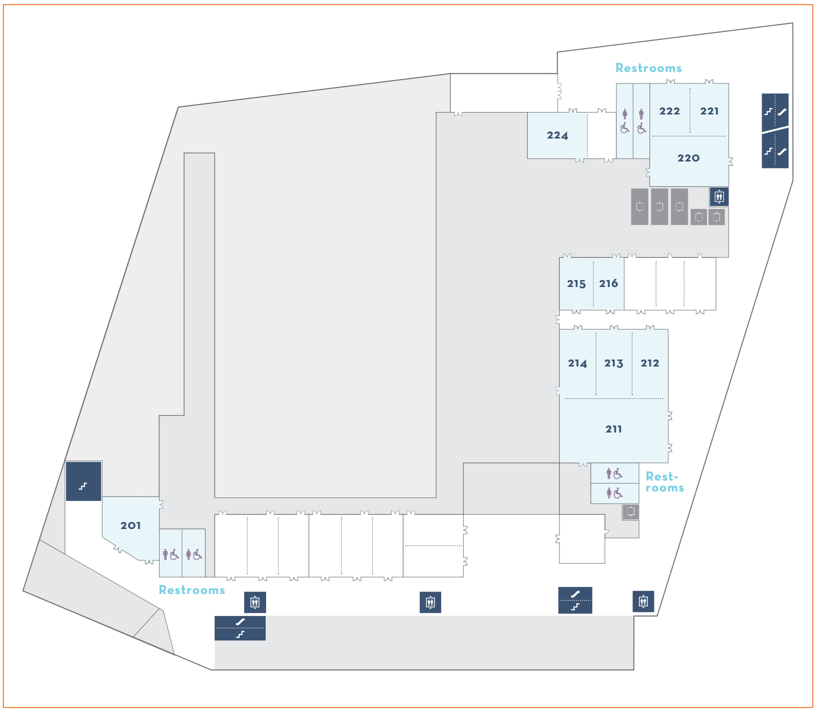


West Level 1

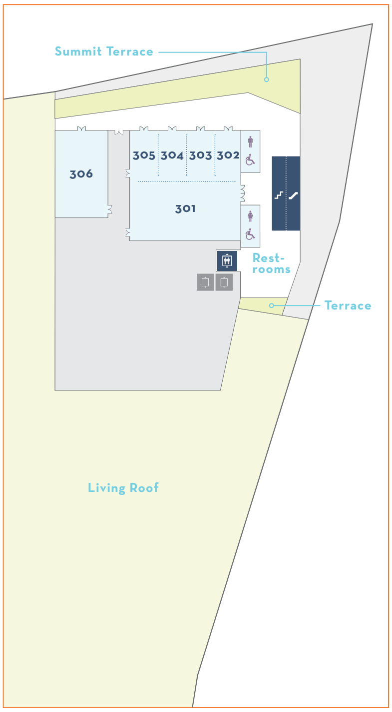


VANCOUVER CONVENTION CENTRE-WEST

West Level 2

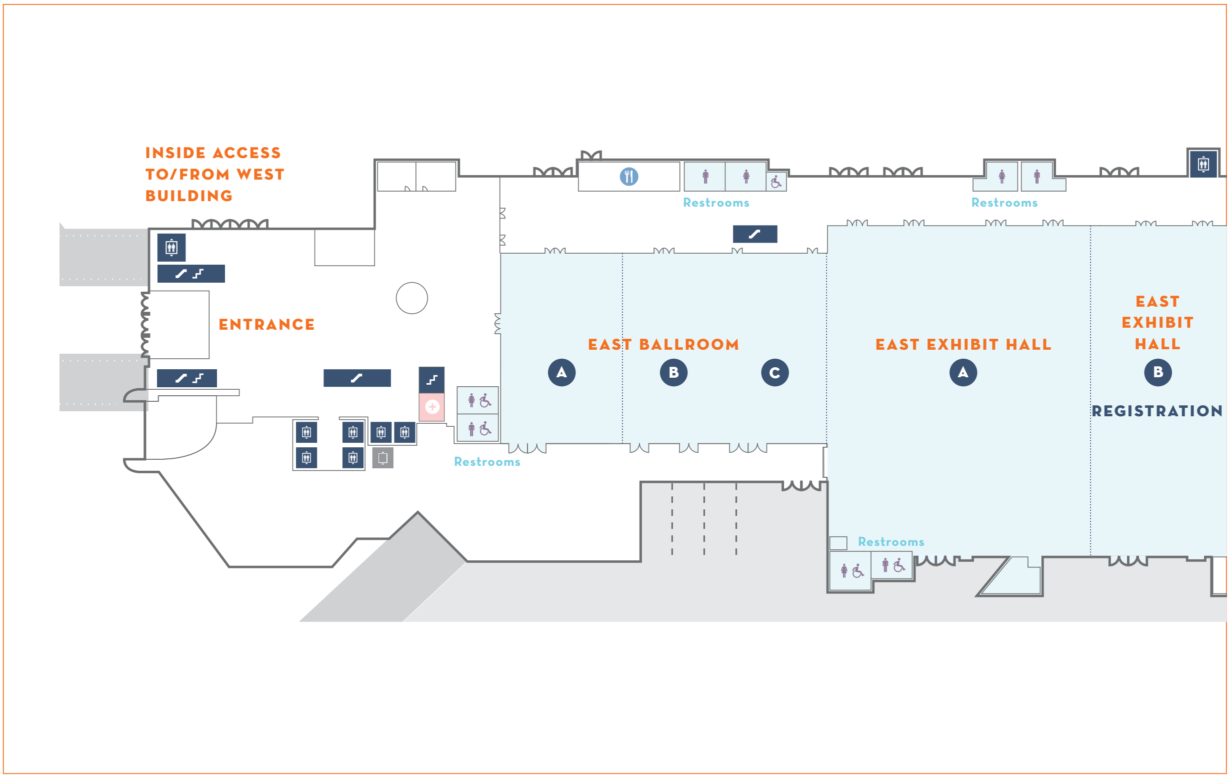


West Level 3



VANCOUVER CONVENTION CENTRE-EAST

Convention Level

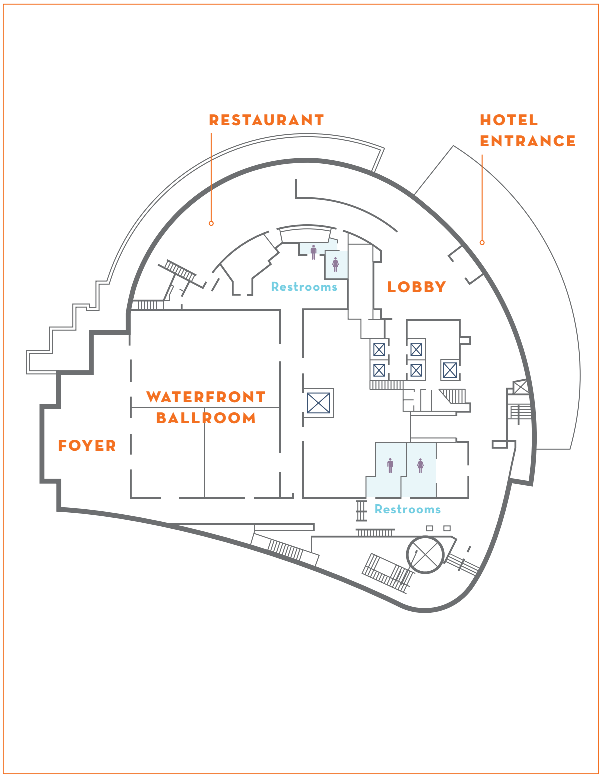


VANCOUVER CONVENTION CENTRE-EAST

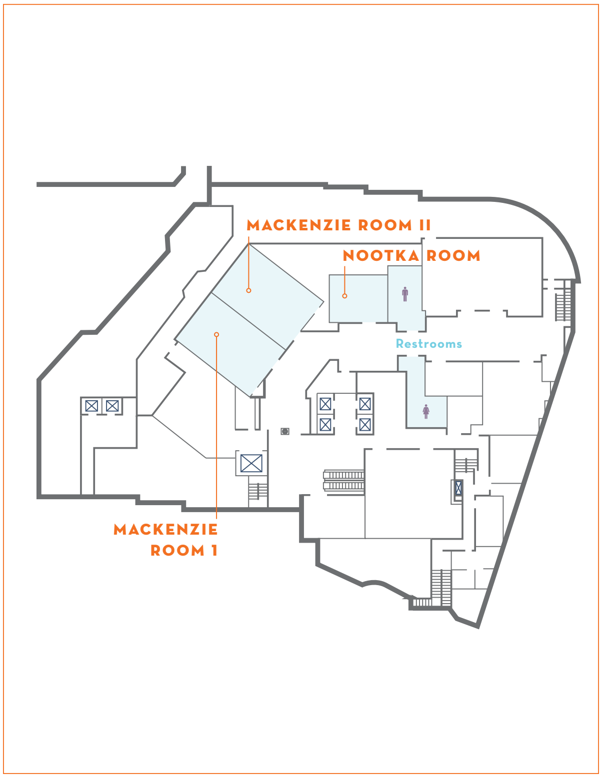
Meeting Level

THE FAIRMONT WATERFRONT

Lobby Level

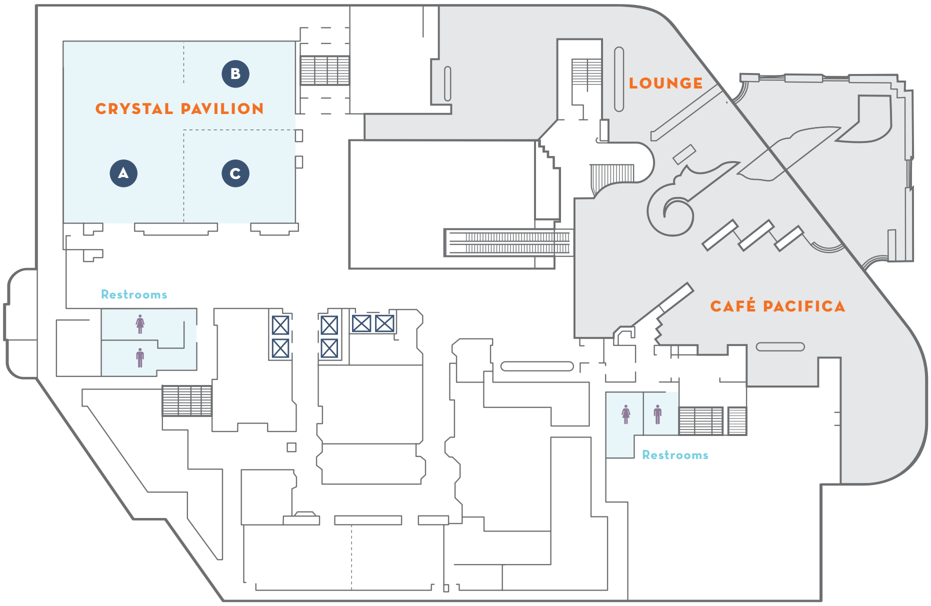


Concourse Level



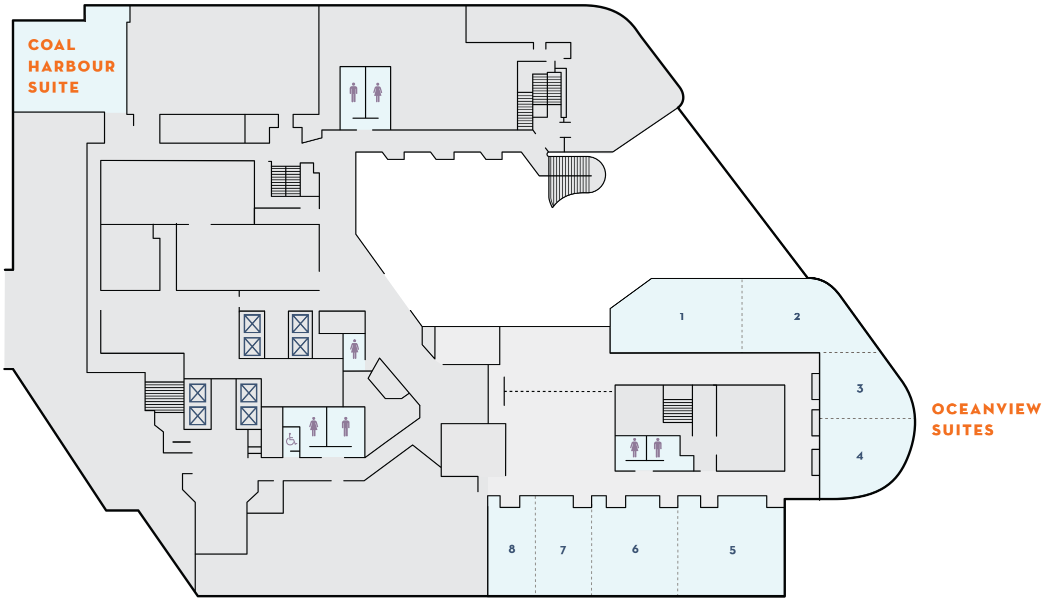
PAN PACIFIC VANCOUVER

Lobby Level



PAN PACIFIC VANCOUVER

Restaurant and Gallery Level



MAKE CONNECTIONS

SCHEDULE AT A GLANCE

SATURDAY, JUNE 11

11 a.m. – 4 p.m.	MDRT Foundation Booth open
11 a.m. – 5 p.m.	MDRT Store open
11 a.m. – 6 p.m.	Registration open
4:30 – 5:30 p.m.	Program General Arrangements (PGA) Volunteer Orientation and Breakout Sessions

SUNDAY, JUNE 12

7 a.m. – 7 p.m.	Registration open
10 a.m. – 4 p.m.	ConneXion Zone® open
10 a.m. – 4 p.m.	MDRT Store open
10 a.m. – 4 p.m.	MDRT Foundation Booth open
1 – 3:30 p.m.	Court of the Table and Top of the Table Program and Reception (2016 Court of the Table and Top of the Table members only)
4 – 4:30 p.m.	First-Time Experience (First-time Annual Meeting attendees only)
5 – 6:30 p.m.	Opening Ceremony (NEW)
6:30 – 7:30 p.m.	MDRT Foundation Booth open

MONDAY, JUNE 13

7 a.m. – 4 p.m.	Registration open
8 – 11:45 a.m.	Main Platform
11:30 a.m. – 5:30 p.m.	ConneXion Zone® open
11:30 a.m. – 5:30 p.m.	MDRT Store open
11:30 a.m. – 5:30 p.m.	MDRT Foundation Booth open
12 – 1:30 p.m.	Special Session: Thriving in the Expression Economy 🎟 ⊘
2 – 4:30 p.m.	MDRT Speaks
5 – 6 p.m.	Quarter Century Club (invitation only)
5:30 – 6:30 p.m.	Top of the Table Reception (invitation only)

PUT MEETING DETAILS IN THE PALM OF YOUR HAND.

Download the new MDRT 2016 app to build your schedule, meet the speakers and connect with attendees.

🎟 Prepaid ticketed event ⊘ No Translation

TUESDAY, JUNE 14

6:30 - 8 a.m.	Special Session: The Skill of Self-Confidence 🎟 ⊘
7 a.m. - 4 p.m.	Registration open
8:30 - 9:30 a.m.	Idea Exchanges & Focus Sessions
9:30 a.m. - 5 p.m.	ConneXion Zone® open
9:30 a.m. - 5 p.m.	MDRT Store open
9:30 a.m. - 5:30 p.m.	MDRT Foundation Booth open
10 - 11/11:30 a.m.	Focus Sessions
12 - 1:30 p.m.	Special Session: Looking Past Limits: It's How You See It 🎟 ⊘
2 - 3 p.m.	Focus Sessions
3:30 - 4:30/5 p.m.	Focus Sessions
5 - 6 p.m.	Quarter Century Club (invitation only)
5:30 - 6:30 p.m.	Top of the Table Reception (invitation only)

WEDNESDAY, JUNE 15

7 a.m. - 2 p.m.	Registration open
7 a.m. - 6 p.m.	Interpretation Headset returns
8:30 - 9:30 a.m.	Cornerstone Presentations
9:30 - 10:30 a.m.	Quarter Century Club (invitation only)
9:30 a.m.- 5:30 p.m.	MDRT Store open
9:30 a.m.- 5:30 p.m.	MDRT Foundation Booth open
10 - 11 a.m.	Court of the Table Open Forum (NEW) (2016 Court of the Table members only) 🎟 ⊘
10 - 11 a.m.	Echo & Focus Sessions
11:30 a.m. - 12:30 p.m.	Focus Sessions
2 - 5 p.m.	Main Platform
8 - 10 p.m.	Party on the Platform

Simultaneous interpretation is not be available for the prepaid ticketed events (🎟 / ⊘).

Your personal meeting name badge is required for entrance into all sessions and events including Main Platform, Focus Sessions, ConneXion Zone®, Opening Ceremony, Cornerstone Presentations, MDRT Speaks, Echo Sessions, Party on the Platform, and ticketed events.

Information in this book is correct at the time of printing. Should any alterations to the program or overall schedule be necessary, corrections will be made and available on the MDRT Meeting App.

SATURDAY, JUNE 11

11 a.m. – 4 p.m.

MDRT FOUNDATION BOOTH

CC:W / English Bay Ballroom Lobby

11 a.m. – 5 p.m.

MDRT STORE

CC:W / Exhibit Hall A

11 a.m. – 6 p.m.

REGISTRATION

CC:E / Exhibit Hall B

4:30 – 5:30 p.m.

PROGRAM GENERAL ARRANGEMENTS (PGA) VOLUNTEER ORIENTATION AND BREAKOUT SESSIONS

CC:W / English Bay Ballroom A

All PGA volunteers should attend this helpful session. President Brian D. Heckert, CLU, ChFC, and PGA Divisional Vice President Todd D. Hruby, LUTCF, address all volunteers, followed by breakout sessions with your task force. In the breakout, you receive instructions from your director and assistant director, then fill out the volunteer form used for your assignments and evaluation.

🌐 🎧 Cantonese 🎧 Japanese 🎧 Korean 🎧 Mandarin 🎧 Spanish

6 – 7:30 p.m.

EXCALIBUR RECEPTION 🎫 🪪

MDRT Foundation Excalibur Society Members and 2016 Inner Circle Society Donors (by invitation only)

The Vancouver Club

PGA VOLUNTEERS ARE HERE TO GUIDE YOU

SUNDAY, JUNE 12

7 a.m. – 7 p.m.

REGISTRATION

CC:E / Exhibit Hall B

10 a.m. – 4 p.m.

MDRT STORE

CC:W / Exhibit Hall A

10 a.m. – 4 p.m. & 6:30 – 7:30 p.m.

MDRT FOUNDATION BOOTH

CC:W / English Bay Ballroom Lobby

10 a.m. – 4 p.m.

CONNEXION ZONE®

CC:W / Exhibit Hall A

1 – 3:30 p.m.

COURT OF THE TABLE AND TOP OF THE TABLE PROGRAM AND RECEPTION 🎫 🪪

This event is for 2016 Court of the Table and Top of the Table members only.

▼

1 – 2:30 p.m.

PROGRAM – THE DISTRACTION SAVVY SALES PROFESSIONAL

Curt Steinhorst / CC:W / English Bay Ballroom A

Today's buyer is harder to reach than ever, and even harder to keep. Their attention drives their decision-making, and that attention is getting more and more divided. How has your customer's brain been rewired, and what does that mean for your sales techniques? A leading voice on strategic communications in the age of distraction, Steinhorst provides strategies to help you leverage your customer's distracted state, communicate more effectively with them and manage the rising demands on your attention.

2:30 – 3:30 p.m.

RECEPTION

CC:W / English Bay Ballroom C

4 – 4:30 p.m. (Doors open at 3:15 p.m.)

FIRST-TIME EXPERIENCE

CC:W / Exhibit Hall BC

This event is open to Annual Meeting first-time attendees only.

Attending the Annual Meeting for the first time is a cherished memory for many MDRT members. 2016 Annual Meeting first-time attendees are invited to this exclusive pre-Opening Ceremony celebration, which begins with a warm welcome from the MDRT Executive Committee. In addition to sharing some of their own cherished Annual Meeting memories, the Executive Committee will offer advice on how to create unforgettable experiences over the next three days. As a bonus, first-time attendees will enjoy sitting front and center for the Opening Ceremony, ensuring they have many wonderful moments to remember.

Cantonese | Japanese | Korean | Mandarin | Spanish

5 – 6:30 p.m. (Doors open at 4:30 p.m.)

OPENING CEREMONY – THE COLORS OF THE WORLD

CC:W / Exhibit Hall BC / Overflow Room: CC:W / English Bay Ballroom A

Enjoy the excitement and fun of MDRT's first Opening Ceremony. Styled after Olympic Opening Ceremonies, this thrilling pageant will feature a cast of more than 200 performers, along with singing, dancing and the Parade of MDRT Flags, which represents every nation with an MDRT member. There will be surprises to delight the child in all of us. An event you don't want to miss, this colorful celebration of MDRT's global membership will begin the moment the doors open and continue until attendees are dancing out the doors at the end.

Cantonese | Japanese | Korean | Mandarin | Spanish

MONDAY, JUNE 13

7 a.m. – 4 p.m.

REGISTRATION

CC:E / Exhibit Hall B

8 – 11:45 a.m. (Doors open: 7:15 a.m. / Entertainment begins: 7:30 a.m.)

MAIN PLATFORM

CC:W / Exhibit Hall BC / Overflow Room: CC:W / English Bay Ballroom A

Presiders	Brian D. Heckert, CLU, ChFC, and Caroline A. Banks, FPFS
Personal Story Power: The Key to Leadership	Bo Eason
Selling In a Global Marketplace	Krish Dhanam
The Global Economic Narrative, 2016	Marci Rossell
Dear World	Robert Fogarty
Break	
I Threw Away the Paint Brush	Red Hong Yi
Add Another Zero	Brian D. Heckert, CLU, ChFC
Promises and Hopes	James V. Durkin, CFP, CLU
Mercy Ships	Don Stephens
Get a Grip	Frank Miles

11:30 a.m. – 5:30 p.m.

MDRT STORE

CC:W / Exhibit Hall A

11:30 a.m. – 5:30 p.m.

MDRT FOUNDATION BOOTH

CC:W / English Bay Ballroom Lobby

11:30 a.m. – 5:30 p.m.

CONNEXION ZONE®

CC:W / Exhibit Hall A

12 – 1:30 p.m.

SPECIAL SESSION: THRIVING IN THE EXPRESSION ECONOMY

Ron Tite / Fairmont Waterfront / Waterfront Ballroom

Lunch service is included and will be served at noon, ending promptly at 12:30 p.m.

Thanks to clutter in the marketplace, complex product and services choices, easy access to information, and an army of citizen journalists waiting to broadcast their customer service experiences, it has never been more critical for a brand to be perfectly and consistently aligned with the personal brands of the people within it. Financial advisor? Assistant? It doesn't matter. Everyone has to be living up to the promise that the brand communicates. This session will not only present what great brands are doing to be successful, it will illustrate how great people can do the same things to achieve personal success.

This session is presented in English. Simultaneous interpretation is not available.

2 - 4:30 p.m. (Doors open: 1:30 p.m.)

MDRT SPEAKS

CC:W / Exhibit Hall BC / Overflow Room: CC:W / English Bay Ballroom A

Presiders	Mark J. Hanna, CLU, ChFC, and James Douglas Pittman, CLU, CFP
Rules of Engagement	Mark J. Hanna, CLU, ChFC
The Power of Words	Bhupinder S. Anand, ACII, Dip PFS
Cards of Life	Astuti Widyawati
Seven Minutes	Brian H. Ashe, CLU
Brain Break	
The Journey Through Retirement	Philip E. Harriman, CLU, ChFC
Rested Thinking	D. Scott Brennan
Environment Before Economics	Philip E. Harriman, CLU, ChFC
Technology Integration and Trends	Ali A. Hashemian, MBA, CFP
The Social Advisor	Ana Sofia Rodriguez, MBA
Brain Break	
12 P's to Top of the Table	Bruce W. Etherington, CLU, CH.F.C.
Brain Break	
The Five Pillars of First Class Client Experiences	Kooi Fong (Christine) Wong
What's Your Professional Time Worth?	Marcus T. Henderson, Sr., LUTCF
The Future of Your Business	Angus Donald McQueen, Dip CII, Dip PFS
Money Dump	E. Dennis Zahrbock, CLU, CFP
Create Your Own Waitlist Practice	Tracey Karen Diana Devonport
Brain Break	

Continued on following page

2 - 4:30 p.m.

MDRT SPEAKS Continued

A Game Plan For Making MDRT Year After Year	Marc A. Silverman, CFP, ChFC
Three Great Ideas From Down Under	Guy Munro Mankey
Three Secrets to Top of the Table	Karl Hartey
A Lifetime of Effort	Russell Collins, Dip LI
Little Things Make the Difference	Marc A. Silverman, CFP, ChFC
My Balloon Was About To Burst — Is Yours?	David Braithwaite, Dip PFS

5 - 6 p.m.

QUARTER CENTURY CLUB

Quarter Century Club members only

Pan Pacific / Crystal Pavilion

5:30 - 6:30 p.m.

TOP OF THE TABLE RECEPTION

Top of the Table members only

Pan Pacific / Oceanview Suites 1–4

TUESDAY, JUNE 14

6:30 – 8 a.m.

SPECIAL SESSION: THE SKILL OF SELF-CONFIDENCE 🎟 ☕ ⊘

Dr. Ivan Joseph / Fairmont Waterfront / Waterfront Ballroom C

Breakfast service is included and will be served at 6:30 a.m., ending promptly at 7 a.m.

No matter what the task, it takes self-confidence to get things done. Dr. Joseph will present self-confidence strategies that apply in business and life. Using visualization and other exercises, he helps people determine the current level of their self-confidence. His fascinating presentation will cover how to develop self-confidence and interpret failure.

This session is presented in English. Simultaneous interpretation is not available. ⊘

7 a.m. – 4 p.m.

REGISTRATION

CC:E / Exhibit Hall B

FOCUS SESSIONS AND IDEA EXCHANGES: 8:30 – 9:30 A.M.

IDEA EXCHANGES

In these interactive sessions, participants are invited to share ideas that have helped them increase productivity and foster professional and personal improvement.

🌐 General

Cantonese
Facilitated by:
Jacqueline Tse Pui Chi
Session Room:
CC:W / Room 110

English
Facilitated by:
William J. Rossi,
CFP, ChFC
Session Room:
CC:W / English Bay Ballroom A

Hindi
Facilitated by:
Chetan Joshi, CFP
Session Room:
CC:E / Room 11

Japanese
Facilitated by:
Tomomasa Saito,
TLC, AFP
Session Room:
CC:W / Room 119

Korean
Facilitated by:
Hyun In Kim
Session Room:
CC:W / Room 221

Mandarin
Facilitated by: Regina Wang
Session Room:
CC:W / Room 302
Overflow Room: CC:W / 306

Spanish
Facilitated by:
Herman Colin
Session Room:
CC:E / Room 1 / 2 / 3

BUILDING A PRACTICE YOU LOVE

Brad Elman, CLU / CC:W / English Bay Ballroom B

As the parent of a child with a severe intellectual disability, 24-year MDRT member Elman's personal situation put a limit on when he was available and how much time he could give to work. The result was the creation of a highly efficient practice. Elman, who has 13 Court of the Table qualifications and one Top of the Table honor, will share how he built a practice that allows him to be an involved family man, active community participant and engaged MDRT volunteer, while still producing at Court of the Table or higher level production. With the right business strategy and attitude, everything is possible!

Whole Person

EXECUTIVE BENEFIT CONSULTING – THE KEY TO CLOSELY HELD AND FAMILY BUSINESS SALES

John Gephart, J.D., CLU / CC:E / Ballroom A

Closely held and family businesses represent 99.7 percent of U.S. employer firms and 42 percent of private payroll. These entrepreneurs are hungry for simple and cost-effective solutions to compete with large corporate employers in attracting and retaining talented executives. The financial professional who develops these dynamic individuals as a target market will find a personally satisfying and lucrative career focus.

This session will:

- Teach winning strategies to present yourself as an executive benefit compensation consultant rather than a salesperson
- Explore the nuances between bonus, split dollar and deferred compensation plans
- Dispel simplistic myths that IRC section 409A is too complex and that split dollar is dead
- Impart the secret of tying benefit plans to increasing shareholder value by utilizing plan features that require collaboration with your business owner client's attorney and accountant.

Protection

DON'T WORRY, RETIRE HAPPY! 7 STEPS TO RETIREMENT SECURITY

Tom Hegna, CLU, ChFC / CC:E / Ballroom B

This session is your guide to straightforward retirement planning in uncertain times. Hegna will focus on three main topics: longevity, long-term care and the key to happiness in retirement. Don't miss this powerful presentation filled with audience participation and a "new way" to see retirement success based on math and science, not opinions!

Retirement/Wealth Planning Strategies Korean

OUTLOOK TO OUTSOURCING: THE COMPLIANT PRODUCTIVITY NINJA

Ashley Pattinson, ADFP, ChLP / CC:W / Room 212

In this session, Pattinson, a four-year MDRT member with one Court of the Table and three Top of the Table honors, will discuss simple steps to take control of your time. He will show you how to plan for the year ahead and publish your annual planner by November each year. Pattinson will cover how to unlock the time-saving functions built into email software and how to set rules that allow your email account to automatically categorize traffic. He'll also discuss the journey from hiring your first employee through sending your work to an external service provider. This will help you create processes to ensure consistent quality and measurable predictable outcomes — enhancing the client experience, compliance and profits.

Practice Management | Hindi

TEN TIPS TO THE TOP...OF THE TABLE

Larry E. Ricke, CLU, ChFC / CC:E / Exhibit Hall A

Ricke, a 41-year MDRT member with 11 Court of the Table and five Top of the Table honors, believes that everyone can build a brand regardless of the size of their office or practice. In this straight-forward presentation, Ricke reveals the strategies and concepts that helped him excel to the next level. Join him as he delivers 10 tips any professional can incorporate to help build a robust financial services practice.

Top of the Table | Japanese | Mandarin

PROSPECTING YOUR WAY TO THE TOP

Marc A. Silverman, CLU, ChFC / CC:W / English Bay Ballroom C

Silverman, a 32-year MDRT member with six Court of the Table and 22 Top of the Table honors, will focus on how an agent can reach Top of the Table status. You will walk away with numerous proven prospecting ideas, and the know-how to immediately implement them as soon as you return home without spending a fortune. You will also learn how to have others prospect for you, rather than trying to do it all yourself. After this session, your new prospecting ideas will enable you will go from 10-3-1 to 10-10-10.

Client Strategies | Cantonese | Spanish

9:30 a.m. – 5 p.m.

MDRT STORE

CC:W / Exhibit Hall A

9:30 a.m. – 5 p.m.

CONNEXION ZONE®

CC:W / Exhibit Hall A

9:30 a.m. – 5:30 p.m.

MDRT FOUNDATION BOOTH

CC:W / English Bay Ballroom Lobby

FOCUS SESSIONS: 10 – 11 A.M.

NO FEAR IN LIFE

Catherine Chee Keng Lian, FChFP, MBA / CC:W / Room 302 / Overflow Room: CC:W / 306

Chee Keng Lian believes that life insurance has given her three opportunities to be reborn. As a young mother, she pursued a career in life insurance sales to spend more time with her children — and found great success. During the Asian financial crisis in 1999, her life insurance provided the funds for her family to maintain a normal life despite the financial upheaval. And after a breast cancer diagnosis in 2010, insurance once again helped Chee Keng Lian during her darkest hours. In this session, Chee Keng Lian shares how her life experiences have given her a unique perspective on the importance of planning for the unexpected. *Presented in Mandarin.*

🌐 Protection | Language

EFFECTIVE MARKETING THROUGH THE POWER OF PUBLICITY

Marsha Friedman / CC:E / Room 1 / 2 / 3

Friedman shows you how to build your brand by positioning yourself as an authority. She shares key components to getting exposure in traditional media, which increases your visibility and credibility, and gives you a powerful social media following. Friedman shares ways to set yourself apart from competition. She'll walk through five steps to identify your own message and share tips on how to pitch yourself as a source to print media and become a guest for TV and radio. Plus, she will discuss how to build a following on social networks.

🌐 Practice Management

WIN YOUR CLIENT'S HEART

You Sung Kim / CC:W / Room 221

Whether it is with clients or prospects, it is important to be a caring, likeable person who can win hearts to build and maintain long-term relationships. In this session, you will learn how to build a personal connection by sharing your own experiences and stories with clients. Kim discusses how this has been an effective way to close business deals and improve productivity.

Presented in Korean.

🌐 Practice Management | Language

HIGHLY EFFECTIVE WEALTH PLANNING MODEL FOR SALES GROWTH

Bernard Lim, CFP, CSFE / CC:E / Exhibit Hall A

As consumers for financial services become increasingly skeptical, demanding and inundated with information, there is a dire need for financial services practitioners to reposition themselves in the market. Enter the Wealth Planning Model, which has proven to be an extremely effective and widely-used tool with three key benefits: promoting trust through its educational approach, providing clarity on relevant issues through its integrated approach, and generating opportunities and long-term business through its holistic approach. The result? Satisfied clients, sales growth and sustainable business!

🌐 Retirement/Wealth Planning Strategies | 🎧 Cantonese | 🎧 Mandarin

GOAL SETTING AND TIME MANAGEMENT IN TWO EASY STEPS

Ravi Pahlajrai Rajpal / CC:E / Room 11

Goal setting is the foundation for any individual or organization. MDRT member Rajpal believes "You hit only what you aim at." Rajpal will share the two easy steps to track your goals and optimize your time. By taking these steps, you will reduce obstacles and create an easy path toward achieving your goals. These two steps are like your GPS, showing you the best and most productive route to reach your goal.

This session offers content specific to India.

🌐 Practice Management

THE TRUTH ABOUT PRODUCTIVITY: YOU CAN'T CATCH UP, BUT YOU CAN GET AHEAD

Audrey Thomas, CSP / CC:W / English Bay Ballroom B

You've got a busy practice. You have clients to service, prospects to reel in and hundreds of emails calling your name — and you still want to leave the office at a decent hour! Thomas has worked with thousands of financial advisors, and she knows that saving time directly impacts earning potential. Technology plays a crucial role in maximizing your productivity — but its interruptions can sabotage your focus. Thomas teaches you best practices in three key areas with practical tips you can apply first thing Monday morning to see immediate ROI.

🌐 Whole Person

TARGET MARKETING AND THE MOMENT

Yasuhisa Ueki, CFP, TLC / CC:W / Room 119

Ueki believes any member can grow their production with commitment and focus. In this session, he shares how to identify your market, manage your time and streamline processes to maximize productivity. Drawing from lessons learned through successes and challenges throughout his career, Ueki takes a realistic, no-holds-barred approach and offers practical solutions to everyday sales encounters that will boost your productivity.

Presented in Japanese.

🌐 Top of the Table Language

FOCUS SESSIONS: 10 – 11:30 A.M.

4TH GENERATION RETIREMENT PLANNING

Guy E. Baker, MSFS, CLU / CC:W / Room 110

Want more clients? Learn to ask these three questions:

- Do you know your number?
- Do you know how much you have to save to reach your number?
- Does your investment process have a high probability of reaching your goal?

In fact, every person you meet needs to be asked if they know the answers. Surveys show more than 85 percent of Americans have no idea how to answer any of these questions. In this session, MDRT Past President Baker, a 46-year MDRT member with 38 Top of the Table honors, will show you the answers and help you learn how to use retirement planning as a way to build a strong retirement income practice.

🌐 Top of the Table

COURAGEOUS CONVERSATIONS

Jane E. Blaufus, CLU / CC:W / Room 212

Blaufus believes the difficult work for advisors begins when they have to deliver on their promises, and it goes far beyond the products and services they sell. Sales training does not prepare advisors to deal with the recipients of their important work. An advisor herself, and suddenly widowed with a 12-year-old daughter, Blaufus has been on both sides of the table. Join her for an engaging presentation which will equip you with tips, tools and strategies to navigate "courageous conversations" with both clients and grief stricken beneficiaries – to set you apart in the hearts and minds of the people you serve.

🌐 Protection 🎧 Japanese

BUILDING YOUR BOOK OF BUSINESS BY REAPING WHAT YOU SOW

Justin J. Deges, FICF, LUTCF / CC:W / English Bay Ballroom C

Raised farming the wheat fields of northwest Kansas, Deges correlates the prolific similarities of farming to the financial sales industry. His successful "Planting Seeds" marketing concept has been used to harvest million dollar yields, and his methods are proven to work by those he has mentored in city and rural communities. Guaranteed to entertain, Deges passionately reveals strategies on how to cultivate deeply-rooted relationships in which clients call you, eliminating the anxiety of calling them. You'll be left with inspiration to not only grow your own practice, but help feed those who rely on you for financial sustenance.

🌐 Client Strategies 🎧 Mandarin 🎧 Spanish

DISCOVER WAYS TO QUALIFY FOR MDRT EVERY YEAR BY APRIL

Van Mueller, LUTCF / CC:E / Ballroom A

In this session, Mueller, a 28-year MDRT member with 25 Top of the Table honors, will show you how to qualify for MDRT early in the year by getting more appointments in the simplest fashion. Mueller will share amazing questions for you to ask that will inspire your prospects to give you an appointment. Next, he will share four questions that will inspire prospects to take action. Finally, you will leave with three sales ideas that will change your insurance career forever. If you could achieve those results in 90 days or less, would you try the ideas?

🇺🇸 Client Strategies

TURNING PROBLEMS INTO POSSIBILITIES - BUILDING RESILIENCE IN LIFE & WORK

Apelles Poh, MFP, CFP / CC:W / English Bay Ballroom A

Someone once said that life isn't always smooth – if it were, it would mean we're already dead. Indeed, life often presents many ups and downs, joys and adversities. Our Adversity Quotient, i.e., the ability to handle and overcome challenges and setbacks, is often a big factor contributing to our success, both in life and work. In this session with 22-year MDRT member Poh, you will learn about cognitive behavioral therapy via seven Power Questions, which will give you a practical handle to turn the problems you face in life and work into possibilities. Remember, when you change your perspective, you can change your life!

Whole Person | Korean | Spanish

12 – 1:30 p.m.

SPECIAL SESSION: LOOKING PAST LIMITS: IT'S HOW YOU SEE IT!

Caroline Casey / Fairmont Waterfront / Waterfront Ballroom

Lunch service is included and will be served at noon, ending promptly at 12:30 p.m.

We often cannot change our circumstances in life, but we can change our response. What others see as obstacles can, if approached differently, be untapped opportunities or advantages – it is just how we frame the situation. An attitude based on positive thinking can make the most insurmountable things achievable. In this presentation, Casey shares how to be open to looking at things from a different perspective. When we do, we can uncover powerful ways to not only cope but succeed in the most unexpected ways..

This session is presented in English. Simultaneous interpretation is not available.

FOCUS SESSIONS: 2 – 3 P.M.

PROTECTING THE "-" INSTEAD OF THE "."

Corey Lee Anderson / CC:W / English Bay Ballroom A

Are you always protecting the "period" for a person and forgetting about the "dash"? The market is alive and well for clients to protect their income regardless of their coverage. Anderson, a four-year MDRT member, addresses how easy it is to supplement existing coverage for complete protection instead of the flawed plan many clients have. The plan doesn't matter until it matters – and then, it's all that matters.

Protection | Hindi | Spanish

CONNECTING ACROSS GENERATIONS

Bill Beausay / CC:E / Room 1 / 2 / 3

We're all aware of the financial risks of failing to connect to the children of our best clients. Yet there seems to be an insurmountable wall: a generation gap that would seem to hinder our chances. In this presentation, Beausay demonstrates five tested ways to connect and influence generations other than your own, and build profitable new business in the process. Beausay takes the audience through three live "connection" exercises as well as a real-time demonstration of useful online media for cross-generation connection.

Practice Management

LEGENDS AND LEGACIES

D. Scott Brennan / Walton W. Rogers, CLU, ChFC / Moderated by: Philip E. Harriman, CLU, ChFC / CC:W / Room 212

Is it possible, in our chosen profession, for different approaches to bring success, wonderful opportunities and inspiration to our colleagues and families? This learning experience will focus on two different visions brought to you in frank discussion from two legendary MDRT mentors. Place it on your agenda to hear Past MDRT Presidents Brennan and Rogers describe proven strategies for success in life and business with different paths to stardom, including ideas you can put to work in your practice today to lead confidently and leave a lasting legacy.

Top of the Table Japanese Korean

THE DOL GAME-CHANGER: WHAT YOU NEED TO KNOW ABOUT THE NEW FIDUCIARY RULE

Caleb J. Callahan, CFP / CC:E / Ballroom B

In April 2016, the Department of Labor (DOL) issued its final rule redefining fiduciary advice for ERISA plans and Individual Retirement Accounts (IRAs). This rule marks the biggest regulatory change the financial services industry has experienced in decades. The implications of this rule will be both broad in scope and significant in impact. This is true for virtually all financial services firms whether you are a fee-based advisory, insurance specialty or multi-disciplinary practice. Callahan testified before both the DOL and U.S. Congress during the final rule making process. Join him for an engaging discussion on details of the final rule, strategies for complying and best practices for running your business in the aftermath.

Retirement/Wealth Planning Strategies

CREATING UNLIMITED REFERRALS AND PERSONAL INTRODUCTIONS WITHOUT ASKING

Bill Cates, CSP, CPAE / CC:E / Exhibit Hall A

Is it possible to build a thriving referral-based business without asking? You bet it is! Cates will show you how. While Cates believes we should always be willing to ask for introductions – without pushing or begging –he has helped thousands of financial professionals grow their business by word of mouth, referrals and personal introductions without ever asking for them.

You will discover:

- Who will give you referrals without asking
- Why client satisfaction isn't enough to stimulate referrals
- Three strategies to quickly become "super referable" with prospects and new clients
- Five ways to get introductions right on the spot – without ever asking.

Marketing Cantonese Mandarin Spanish

ENGAGING AND MOTIVATING HIGH-NET-WORTH CLIENTS

Rao K. Garuda, CLU, ChFC / CC:W / English Bay Ballroom B

Garuda is a 33-year MDRT member with two Court of the Table and 22 Top of the Table honors. He believes two of the major challenges for all advisors are motivating their clients and understanding the many different choices available amid the high-tech media's numerous distractions. Keeping it simple yet effective is Garuda's specialty, and it has enabled him to perennially qualify for Top of the Table.

🌐 Protection

LONG-TERM CARE INSURANCE: LIVE WITHOUT COMPROMISE

Jennifer Jacobs, CFP, CLU / CC:E / Ballroom A

Long-term care protection is growing in awareness and need. This session will help you see long-term care planning with fresh enthusiasm and position long-term care as an instrumental solution within your practice. Using both a qualitative and quantitative approach, Jacobs will examine the need, the value and the impact this type of coverage can have to both your clients and your future business.

🇺🇸 Protection

MARKETING AND SALES STRATEGIES FOR ASIAN CONSUMERS

Min-Ho Kong, CFP / CC:W / Room 221

With rapidly changing technology, crowdsourcing and social media, today's marketers face many challenges in their attempts to reach target markets. A one-size-fits-all approach derived from Western tactics does not address the diverse, cultural needs of Asian consumers. During this session, you will gain insight on the emotional and motivational factors of buying decisions, learn ways to communicate for sales prospecting and discover the cultural comparisons between the East and West. Leave with a deeper understanding about how to tailor your marketing and sales efforts to directly impact your Asian clients.

Presented in Korean.

🌐 Marketing Language

GENERATE A NEW POLICY EVERY DAY!

May Koo, FChFP, ChIFP / CC:W / Room 302 / Overflow Room: CC:W / 306

Insurance agents play an important role in educating clients about the value of life insurance to protect their financial security. In this session, Koo shares her insights on the necessary communication and prospecting skills that will lead to not only closing one deal, but generating daily sales. You will leave this session ready to win!

Presented in Mandarin.

🌐 Marketing Language

LESSONS FROM TOP OF THE TABLE MEMBERS AROUND THE WORLD

Futoshi Kuwano, TLC / CC:W / Room 119

Since he first qualified for MDRT, Kuwano aspired to be a Top of the Table member. Every year, he attended the Annual Meeting to learn from Top of the Table members around the world. Through trial and error, he built a strong team of financial professionals and now delivers seminars to business owners throughout Japan. In 2015, he earned his first Top of the Table qualification. In this session, you can learn from his experience to reach your goal of Top of the Table.

Presented in Japanese.

🌐 Practice Management | Language

REINVENT

Bharat Vadilal Parekh / CC:E / Room 11

Do you want to make your future better than your past? Are you looking to change the way you do things? Do you wish to make major life improvements rather than small changes? Parekh challenges you to press life's "reset button" by taking a deeper dive into self-reflection. In this session, Parekh discusses three tools he applies to his professional and personal pursuits: understanding your unique abilities, staying connected and prospecting up. According to Parekh, reinvention is the instrument that makes successes bigger and better.

This session offers content specific to India.

🌐 Whole Person

SOCIAL SECURITY BENEFITS – NO LONGER JUST A RETIREE'S LUNCH MONEY

Cheryl Robertson, J.D. / CC:W / Room 110

Social Security accounts for half of retirement income for 65 percent of Americans. Understanding how to maximize them and capitalize on their tax-efficient nature can mean the difference between retirement and "work-tirement" for many clients. Join Robertson as she explains how to analyze the myriad benefit options, effectively incorporate them into retirement plans and capitalize on the tax-efficiency a Social Security-weighted retirement plan can provide.

🇺🇸 Retirement/Wealth Planning Strategies

MAKING MDRT THROUGH MULTI-LINE

James J. Van Ham, CLU, CFP / CC:W / English Bay Ballroom C

With the number of career life insurance producers in decline, many prospects are turning to the trusted relationship they have built with their multi-line agents for advice. The "trust factor" is important, and no producer today has a greater opportunity to create and continue a trusted relationship than a knowledgeable, qualified multi-line producer. Unfortunately, if a multi-line producer wants to advance their skill in advanced markets, they must do it on their own. There in lies the challenge presented to the millions of Americans who are looking for professional advice today and in the years ahead. This presentation will begin the dialogue necessary to move the discussion from "what we have done" to "what we can do." Learn ideas to engage prospects as well as proven techniques to cross-sell your existing clients' financial services products, increasing your retention numbers and profits.

🌐 Client Strategies | 🎧 Cantonese | 🎧 Mandarin

FOCUS SESSIONS: 3:30 – 4:30 P.M.

GROW YOUR NETWORK TO EXPAND YOUR BUSINESS

Eiji Fujita, TLC / CC:W / Room 119

Agents and advisors meet a lot of people and make connections every day. In this session, Fujita encourages you to work closely with clients in different professions to solve problems together. Approaching the problems from a different angle may lead you to a different solution, and you will build stronger relationships along the way. Fujita also shares his method for developing new markets and approaching business markets.

Presented in Japanese.

Client Strategies Language

DREAMS, GOALS AND MEETING MDRT

Shin Sook Lee / CC:W / Room 221

Shin Sook Lee believes the mission of life planners should always be to preserve clients' hopes and dreams, both for themselves and their children, when they are facing adversity. When those dreams come true, "insurance" is the most beautiful word in the world. In this session, Lee discusses how her MDRT membership has given her the tools to educate her clients about the value of insurance. Lee also discusses best practices in client service and emphasizes the importance of maintaining existing contacts rather than seeking new ones.

Presented in Korean.

Whole Person Language

BUSINESS BUILDING VS. RELATIONSHIP BUILDING

Venkateswara Rao Vakalapudi / CC:E / Room 11

Building relationships is critical and can lead to potential clients as well as new, untapped business opportunities. Vakalapudi shares his story so attendees can learn how to establish trust and credibility and build long-lasting business relationships with clients.

This session offers content specific to India.

Client Strategies

GET REFERRALS FROM YOUR CLIENTS

Zheng Yu (Nick) Wu / CC:W / Room 302 / Overflow Room: CC:W / 306

Your best source of new business is satisfied clients. Nothing's better than a referral from someone who had a good experience and is eager to offer a strong prospect. Yet many advisors struggle to generate referrals consistently, and some clients are hesitant to refer friends, family and business contacts. In this session, Wu shares tips and discusses effective ways to create more business opportunities from your existing client base.

Presented in Mandarin.

Client Strategies Language

FOCUS SESSIONS: 3:30 – 5 P.M.

4TH GENERATION RETIREMENT PLANNING (REPEAT SESSION)

Guy E. Baker, MSFS, CLU / CC:E / Ballroom B

Want more clients? Learn to ask these three questions:

- Do you know your number?
- Do you know how much you have to save to reach your number?
- Does your investment process have a high probability of reaching your goal?

In fact, every person you meet needs to be asked if they know the answers. Surveys show more than 85 percent of Americans have no idea how to answer any of these questions. In this session, MDRT Past President Baker, a 46-year MDRT member with 38 Top of the Table honors, will show you the answers and help you learn how to use retirement planning as a way to build a strong retirement income practice.

🌐 Top of the Table | Cantonese | Spanish

HOW MUCH MORE LIFE INSURANCE CAN I BUY?

Robert M. Ball / CC:W / English Bay Ballroom B

Far too often, the role of permanent life insurance – and life insurance advisors – is deemed unnecessary, costly and damaging to an individual's financial future. These realities have left the public underinsured and underserved. In this stimulating 90 minute workshop, Ball, a permanent life insurance advocate, will unveil the three critical elements that are missing in most life insurance sales presentations. These keys highlight the true power of life insurance, and may dramatically boost your sales. If you are not routinely being asked "How much more life insurance I can buy?" by your clients, perhaps it's time to see what you have been missing.

🇺🇸 Protection

A REVOLUTIONARY APPROACH TO ADVISING CLIENTS

Tim Cestnick, FCA, FCPA / CC:E / Exhibit Hall A

In this presentation, Cestnick will share insights into a new approach to advising clients. This approach can motivate a client to act on advice in a timely manner, and can move any professional quickly into the realm of the most trusted advisor. This is an approach that Cestnick and the firm he founded – one of Canada's most successful family office firms – has been using with much success for years. You will build a hedge of trust around your clients and will see an acceleration of referrals from your best clients.

🌐 Retirement/Wealth Planning Strategies | Japanese | Mandarin

7 STRATEGIES TO HELP YOU REACH MDRT'S TOP OF THE TABLE

George D. Goulet, TEP, CFSB / CC:W / English Bay Ballroom C

What is it that the highest earning advisors do differently than the others? Specifically, how do they think differently and what different choices do they make to attract the ideal clients? Goulet, a 20-year MDRT member with 19 Top of the Table honors, will provide attendees with seven proven strategies learned from his many years as a Top of The Table producer. His strategies can be immediately implemented to produce significantly higher results. If you aspire to a higher level of success and seek to experience your full potential, then this session is for you.

🌐 Top of the Table | Mandarin

GREY HAIRS TO YOUNG BUCKS: HOW TO FIND A SUCCESSOR OR BE ONE

Tom Guzzardo / Daniel R. Meylan / CC:E / Room 1 / 2 / 3

Succession planning is a problem whether you are a “Grey Hair” or a “Young Buck.” “Grey Hairs” ask, “What will happen to my clients and my practice?” “Young Bucks” need to understand practice valuation, and how to resolve generational issues and write a workable succession agreement. There are practical ways to find the right “Young Buck” successor and ensure a successful practice transition to the next generation. This presentation changes the game with the new processes and specific steps to transferring relational equity. Advisors will discover how to identify the pitfalls that sabotage succession and how to profitably perpetuate client relationships.

🌐 Practice Management

STRENGTHEN YOUR CAREER, SUPERSIZE YOUR RELATIONSHIPS

Vicki Hitzges, CSP / CC:W / Room 110

As a top insurance agent, you’ve made big sales and soared high. That’s the good news. The bad news is that the families of high achievers often pay a price for their success. This energetic session focuses on crucial people skills, from how to turn strangers into life-long customers, to how to keep a positive attitude, to how to make your spouse and children feel valued and loved. The goal of this session is to help you make a positive, lasting impact on your clients, friends and family.

🌐 Whole Person

WOWING BY DESIGN!

Michelle Hoskin / CC:E / Ballroom A

We all want to wow, and we all want to be wowed! However, in a profession where we spend nearly every waking moment focused on taking care of clients’ needs, we often forget to take care of the most important things of all: ourselves and our businesses! Having an amazing life and an amazing business doesn’t happen by accident; it can only happen by design. Learn Hoskin’s “10 Principles of WOW!” and feel invigorated, energized and inspired to once and for all take your business from woe to WOW!

🌐 Practice Management

ILLUSTRATED ADVICE: SHOW YOUR CLIENTS WHAT GOOD ADVICE LOOKS LIKE

Paul Mollica, CFP / CC:W / Room 212

The game of finance can be a mystery for clients and advisors alike. In this session, MDRT member Mollica, a 15-year financial planner and sales trainer, will showcase simple and effective illustration tools and engagement techniques that you can use in your business immediately. Asking better questions of your clients and showing that you understand them is an underutilized and extremely powerful formula for success that everyone can easily master. When you are literally on the same page as your clients, great things will happen!

🌐 Retirement/Wealth Planning Strategies Cantonese Korean

BUILD A BRAND THAT SETS YOU APART

Doug Towill, MBA / CC:W / English Bay Ballroom A

Does your brand allow you to enjoy the success you deserve? In a market that bombards consumers with overwhelming amounts of information, financial advisors need to have a clear and powerful brand to stand out. Join Towill as he introduces and explores a proven brand framework to help you:

- Develop your core messages to position yourself competitively
- Identify the foundational business beliefs that drive your actions and processes
- Effectively articulate your brand to clients and prospects.

You will be recognized as a leader in the industry and the "go-to" individual by consciously building and communicating your brand.

Marketing Hindi Spanish

5 – 6 p.m.

QUARTER CENTURY CLUB

Quarter Century Club members only

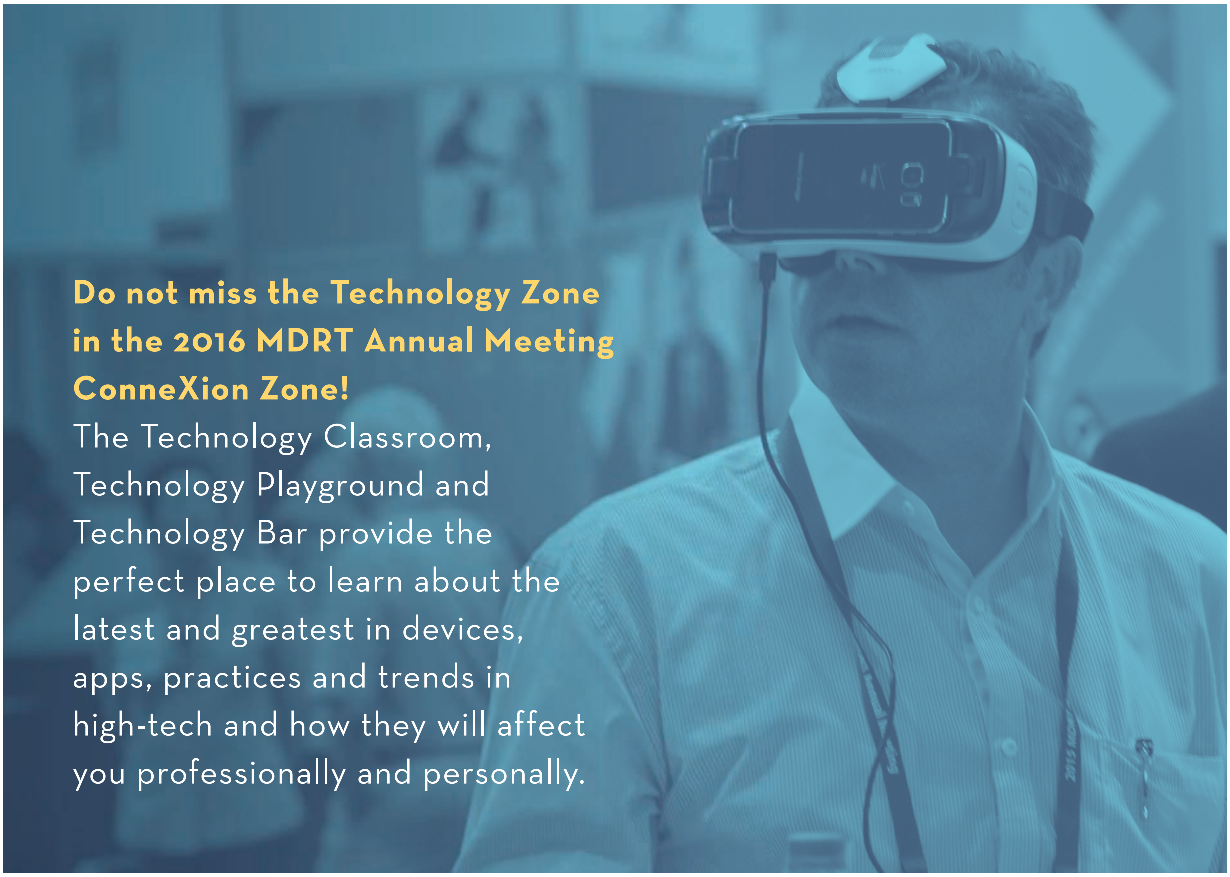
Pan Pacific / Crystal Pavilion

5:30 – 6:30 p.m.

TOP OF THE TABLE RECEPTION

Top of the Table members only

Pan Pacific / Oceanview Suites 1–4



Do not miss the Technology Zone in the 2016 MDRT Annual Meeting ConneXion Zone!

The Technology Classroom, Technology Playground and Technology Bar provide the perfect place to learn about the latest and greatest in devices, apps, practices and trends in high-tech and how they will affect you professionally and personally.

Mercy Ships, a charitable organization that operates a hospital ship, provides free life-changing surgeries and medical care for children and adults who do not have access to a doctor.

Support the MDRT Foundation's partnership with Mercy Ships by donating to provide medical care for people in developing countries. The suggested donation is **USD 200**, but any amount will make a difference. Each donation will be divided evenly to support Mercy Ships and the MDRT Foundation's global grant programs. MDRTFOUNDATION.ORG

MDRT
FOUNDATION

Mercy
Ships

New Location! The MDRT Foundation Booth is located in CC:W – English Bay Ballroom Lobby.

WEDNESDAY, JUNE 15

7 a.m. – 2 p.m.

REGISTRATION

CC:E / Exhibit Hall B

7 a.m. – 6 p.m.

INTERPRETATION HEADSET RETURN

CC:E / Exhibit Hall B

8:30 – 9:30 a.m.

CORNERSTONE PRESENTATIONS

EVOLVING OURSELVES

Juan Enriquez

Presider: Ross Vanderwolf, CFP / CC:W / Room 212

Enriquez is recognized as one of the world's leading authorities on the economic and political impacts of life sciences. From his work on the cutting edge of discovery, he will describe the extraordinary advances in life sciences that are changing the way we live and do business. This transformation is as important as the one brought about by the Internet, and it has immense consequences for industry. Researchers have learned how to program a cell much like a computer, giving us and our children the ability to generate wealth on an unprecedented scale and invent entirely new fields. In this entertaining presentation, look into a world where humans increasingly shape their environment and learn how genomics and other life sciences are already altering some of the world's largest companies.

Hindi Spanish

OBSTACLES VS. OPPORTUNITIES

Warren Macdonald

Presider: James Douglas Pittman, CLU, CFP / CC:W / English Bay Ballroom A

When it comes to limiting or improving our performance, perception is the most important factor. A catastrophic mountain-climbing accident redefined Macdonald's life, costing him his legs and forcing him to change all his perceptions. By changing our perception, we can begin to develop a breakthrough mindset to view setbacks in life not as obstacles, but as opportunities. Through his own story, Macdonald will share specific tools and techniques to help break through the barriers that limit us and describe how to develop strategies to counter the inevitable setbacks that always come when pursuing big goals.

Cantonese Korean

THE BUSINESS OF SOCIAL CHANGE

Bill Strickland

Presider: Mark J. Hanna, CLU, ChFC / CC:W / English Bay Ballroom C

Strickland is a mesmerizing speaker who will inspire you to make a difference in your life and in the lives of those around you. Ever-gracious, he delivers a profoundly simple, optimistic message: give people the tools they need and treat them with respect, and they will perform miraculous deeds. He believes we all make ourselves "poor" in one way or another when we accept that we are not smart, experienced or talented enough to accomplish something. His own story of hope is a testament to his powerful belief: "A successful life is not something you simply pursue — it is something that you create, moment by moment."

Japanese Mandarin

THE ART OF VISION

Erik Wahl

Presider: Caroline A. Banks, FPFS / CC:W / Exhibit Hall BC

The best sustainable edge in business is the ability to differentiate yourself from your competition. Uncover new ways to be more creative, innovative and profitable through this entertaining and highly practical session. With Wahl, an internationally recognized graffiti artist and best-selling author, as your guide, learn the benefits of becoming a better storyteller.

This session will be available in all languages for which MDRT provides interpretation.

9:30 – 10:30 a.m.

QUARTER CENTURY CLUB

Quarter Century Club members only

Pan Pacific / Crystal Pavilion

9:30 a.m. – 5:30 p.m.

MDRT STORE

CC:W / Exhibit Hall A

9:30 a.m. – 5:30 p.m.

MDRT FOUNDATION BOOTH

CC:W / English Bay Ballroom Lobby

10 – 11 a.m.

ECHO SESSIONS

In these conversational style sessions, MDRT member facilitators will share their understanding of the key messages from various presentations given on Monday and Tuesday. They will also discuss how they plan to use key takeaways in their practice.

CANTONESE ECHO

Facilitated by: Pui Sze (Krys) Choy and Henry Wong, AFP, RFC / CC:W / Room 110

HINDI ECHO

Facilitated by: Nikhil Shah, LUTCF, AFP / CC:E / Room 11

JAPANESE ECHO

Facilitated by: Hirofumi Morimoto and Izumi Osada / CC:W / Room 119

KOREAN ECHO

Facilitated by: Joo Won Cha, Soo Chang Hu and Seung Hoon Lee / CC:W / Room 221

MANDARIN ECHO

Facilitated by: Terence Chan, Patric Leung and She Yung (Aileen) Ling / CC:W / Room 302 / Overflow Room: CC:W / 306

SPANISH ECHO

Facilitated by: Lorenzo Gallardo / CC:E / Room 1 / 2 / 3

10 – 11 a.m.

COURT OF THE TABLE OPEN FORUM

NEW

Fairmont Waterfront / Waterfront Ballroom

This event is open to 2016 Court of the Table members only.

Court of the Table members will have an opportunity to connect and engage in conversations about subjects that matter to them most during this hour long session. Informal round table discussions will be facilitated by Court of the Table members. Topics include staffing, technology, compensation strategies, branding and marketing, time management, hiring practices, transition planning, fee vs. commission and social media.

Attendees are encouraged to move from table to table for topics that interest them and share their insights, challenges and successes to build a lively discussion.

This session is presented in English. Simultaneous interpretation is not available.

FOCUS SESSIONS: 10 – 11 A.M.

FROM THE EDGE OF (FINANCIAL) OBLIVION TO COURT OF THE TABLE

Douglas John Bennett, Dip PFS / CC:E / Exhibit Hall A

Bennett, a nine-year MDRT member with two Court of the Table honors, believes that "as you sow, so shall you reap," and if you sow at MDRT, the reward is always a bumper harvest. From losing his parents in close succession in 2006 to nearly losing his business in 2010, Bennett relays his amazing journey to MDRT's Court of the Table – the people he has met, the friends he has made, and the ideas he has picked up and developed. Join Bennett as he shares his journey and concepts that have helped him move from scraping by to Court of the Table.

Client Strategies | Mandarin

SKILLS THAT SUCCEED IN THE UNTAPPED BUSINESS INSURANCE MARKET

Russell Collins, Dip LI / CC:W / English Bay Ballroom A

The business insurance market is nothing more than one business owner (advisor) sitting across the table from another business owner (client) and asking questions. The answers to these questions inevitably expose insurance problems that the second business owner did not even know existed. If it is that simple, why aren't more advisors involved in this market? In this session, 44-year MDRT member Collins will cover how to transition into the closely held-type market and then how to get from saying "hello" in the initial meeting to getting the opportunity to present recommendations.

Protection | Japanese

UNIQUE ASSETS: THE HIDDEN HALF OF YOUR CLIENTS' WEALTH

Brad Davidson / CC:E / Ballroom A

Only half of high-net-worth Americans' assets are stocks, bonds, mutual funds and other liquid investments. The other half consists of real estate, interests in privately-owned businesses, life insurance, artwork, mineral interests and other "unique assets." Unique assets pose predictable challenges to their owners, yet surprisingly few advisors offer solutions. In this presentation, Davidson, the author of the "Unique Asset Road Map," will identify the services unique asset owners value, and will argue that by offering them, advisors distinguish themselves from their competitors, attract new clients and grow assets under management.

Top of the Table

MARKET LIKE A ROCK STAR

Darnyelle A. Jervey, MBA / CC:W / English Bay Ballroom C

In her signature workshop, Jervey shares her secrets to transform you from a marketing rookie into a marketing rock star. This is not your grandfather's marketing strategy — it's hip, fresh and proven to grow any business.

You'll discover how to:

- Create marketing systems that lead to massive business growth
- Serve a product progression plan to build clients for life
- Position your uniqueness so your ideal clients find you online and offline
- Leverage fresh ways to market your products and services to increase impact, influence and income.

Marketing Mandarin

A SOCIAL MIRACLE: LIFE INSURANCE

Stuart Shee Yew Kuen, BBA / CC:E / Ballroom B

Eighteen-year MDRT member Shee Yew Kuen believes that life insurance is a social miracle. A beneficiary of his own risk-planning program, he has kept many families intact in times of catastrophe. Early in his career, his work made it possible for a friend to choose to die at home with dignity and not in a charitable home or hospice. He will share four essential skills that can help a financial advisor turn a prospect into a client and eventually an advocate for their business.

Protection Korean Spanish

THE HACKER'S BLACKLIST: CYBER SECURITY FOR FINANCIAL PROFESSIONALS

John Sileo / CC:W / Room 212

As a trusted advisor, you're tasked with defending the vast currency of organizational information critical to your clients' identities and wealth, from account numbers to financial apps and cloud services. Protecting information assets is both ethical and profitable, and engenders customer loyalty. This data security crash course forges a high-level, non-technical path through the web of human decisions, computer security, mobile technology and Internet privacy. You can't possibly protect everything — but you must protect the right things. By the end of The Hacker's Blacklist, you will understand the top five threat countermeasures to protect your data, privacy and profits.

Practice Management Cantonese Hindi

THE LIFETIME IMPACT OF LOST OPPORTUNITY COSTS

Thomas W. Young, CLU, ChFC / CC:W / English Bay Ballroom B

Most clients can easily understand a principal loss, but it is often eye-opening and life-changing when they realize the unseen loss that also occurs with every financial loss. That unseen loss is the interest that the principal would have earned over that client's life, therefore creating a lifetime lost opportunity cost. Young, a 24-year MDRT member with five Court of the Table and five Top of the Table honors, has worked with his clients for more than 40 years to help them identify the obvious and not-so-obvious situations where financial losses take place. Join him as he examines different loss situations and provides solutions that have worked for his clients.

🌐 Retirement/Wealth Planning Strategies

FOCUS SESSIONS: 11:30 A.M. – 12:30 P.M.

THINK THE UNTHINKABLE TO SPARK TRANSFORMATION IN YOUR BUSINESS

Nikhil Jitendra Anandpara, CFP, CII / CC:E / Room 11

In this session, Anandpara teaches you how to build a personal brand to set yourself apart from the competition. He illustrates ways to zero in on a businesses' unique products and services to define what differentiates one business from the rest. He also helps you better understand client needs and perceptions, teaches you how to use customer feedback to strengthen marketing efforts, and discusses how to develop creative sales presentations.

This session offers content specific to India.

🌐 Marketing

BUILDING A SUSTAINABLE BUSINESS

Brad Bueermann / CC:E / Ballroom B

The average insurance professional is approaching retirement age, while the life expectancy of their clients may extend for 30 years or more. Clients have a real concern about who will serve them in the coming decades. The presentation will look at strategies to ensure the longevity of a firm, deal with aging professionals, and bridge the gap between advisors' interests and clients' expectations. Sustainable businesses are better suited to recruit and train the next generation of professionals, which diversifies the profession and provides a link to the emerging demographic of savers and investors. The resulting benefits are a win-win-win for professionals, clients and the institutions that support them.

🌐 Practice Management 🎧 Japanese

THE EASIEST WAY TO SELL LIFE INSURANCE

Pedro Camarena / CC:E / Room 1 / 2 / 3

In this presentation, Top of the Table member Camarena shares five steps that can make selling life insurance easy and fun. Camarena devotes only a third of his time to selling insurance, thus he had to develop a simple and effective system to remain a top producer for his 20 years in the industry. He presents ideas on how to identify opportunities, overcome objections, improve communication and apply a results-oriented strategy that wins every time.

Presented in Spanish.

🌐 Client Strategies Language

QUALIFY FOR MDRT YEAR AFTER YEAR

Hiromichi Chiba, AFP, TLC / Keita Honda / CC:W / Room 119

Chiba and Honda believe that qualifying for MDRT should not be a one-time event. As longtime MDRT members, they encourage other advisors to qualify for MDRT year after year. In sharing what motivates them to qualify for MDRT, Chiba and Honda discuss the "dos and don'ts" and learning experiences encountered on the path to membership. They also encourage you to think about the requirements you set upon yourself to ensure continued membership in MDRT.

Presented in Japanese.

🌐 Whole Person Language

KEEP YOUR MDRT HEART

Wing Man Chin / CC:W / Room 110

Wing Man Chin is a proven example of how you can flourish under MDRT's influence, and he believes MDRT's mission is the core of a successful, lasting career. In this session, Chin shares the key values he believes differentiate MDRT members from other industry professionals. He also discusses how to make the most of MDRT membership and shares lessons he has learned as a member.

Presented in Cantonese.

🌐 Whole Person Language

YOU NEVER KNOW WHAT'S AROUND THE CORNER

John Maher / CC:W / Room 212

Life was perfect for John Maher, his wife, and their four daughters, until John was seriously injured in a car crash at age 42. A successful life insurance manager, Maher was soon told by doctors that he would never work again. His journey will shock and enlighten you, and you will realize what happened to him can happen to anyone. His true-life story will empower you to become the trusted and magnificent advisor that your clients require you to be. They are relying on you!

🌐 Protection Cantonese

WHO ARE YOU AND WHY SHOULD THEY CARE?

Adam McCann, CFP / CC:W / English Bay Ballroom C

By asking three wildly important questions, McCann, an eight-year MDRT member with three Court of the Table and three Top of the Table honors, believes you can define your business and win over the hearts and minds of your potential marketplace, in spite of the competition. In a dynamic and interactive account, McCann will share his journey through the questions (Who are you? Why are you? and Why should they care?) to demonstrate how he arrived where he is today. At the end of this session, you will have strategies to develop answers of your own.

🌐 Practice Management Hindi Mandarin

CONTEXT, KNOWLEDGE AND BELIEF

Stig O. Nybo / CC:E / Ballroom A

Our world is in a chronic state of under-saving, which not only threatens our ability to retire with dignity, but also puts at risk the very fabric of our society. While behavioral economics is helping to powerfully shape the context of saving, we must be cautious about fixing the symptom and ignoring the problem. It will take much more than the blissful inertia of “set it and forget it” to truly motivate a change in societal saving and spending behavior. Come explore the impact of behavioral economics, financial literacy and beliefs on saving behavior.

Retirement/Wealth Planning Strategies

HAVING A HEALTH LINE OF CREDIT FOR CRITICAL ILLNESS

Godfrey Phillips, FChFP, J.P. / CC:E / Exhibit Hall A

Critical illness insurance (CII) is necessary not because you die, but because you survive. Over the last century, the major causes of death shifted from infectious diseases to "lifestyle" conditions like heart attack, cancer, stroke and by-pass operations. In their lifetime, 80 percent of people will suffer from one of these big four critical illnesses. This presentation is a tribute to the late Dr. Marius Barnard, who created the CII product in 1983. Phillips, a 32-year MDRT member, will explain why it is imperative to discuss CII in your meetings with your clients. You will learn the language of critical illness insurance, what questions to ask prospects and how CII can provide your clients with “money freedom” and “time freedom.”

Protection Korean Mandarin

STEP ON THE MARKETING & BUSINESS ACCELERATOR WITH LINKEDIN

Barbara Rozgonyi / CC:W / English Bay Ballroom A

In the financial services industry, there’s no better place to spend your time online than LinkedIn. Find out how to transform a lonely LinkedIn profile into a super-charged network that positions you and your company as the leaders your target clients are looking for. More than just an online resume, your LinkedIn profile connects you to the virtual marketplace of the business world. With more than 400 million members, LinkedIn offers a high-performance personal branding platform that you activate, design and manage. You can grow your business by integrating LinkedIn into sales, customer service or marketing efforts for immediate and long-term impact throughout your business and community.

Marketing Spanish

THE CHALLENGE OF VALUE INVESTING

Lawrence Sarbit / CC:W / English Bay Ballroom B

Charlie Munger, vice-chairman of Berkshire Hathaway, has said, “Value investing is simple but not easy.” In this presentation, Sarbit will outline some of the major problems investors face in trying to allocate capital to equities. Then, he will present the method he has used successfully over the past 27 years — a value, business-like approach to buying part-ownership in publically traded companies.

Retirement/Wealth Planning Strategies

SHARING IDEAS FOR GROWING BUSINESS IN ESTATE & GIFT PLANNING

Kyo Wook Son, CFP / CC:W / Room 221

In Korea, estate and gift taxes have become a hot topic as people seek out financial products to help them reduce their taxes. In this session, Son shares tips and new sales approaches to educate clients about these topics. Son also sheds light on how to develop new markets and expand your business.

Presented in Korean.

Retirement/Wealth Planning Strategies | Language

HOW TO TALK ABOUT INSURANCE WITH HIGH-NET-WORTH CLIENTS

Fang Xie / CC:W / Room 302 / Overflow Room: CC:W / 306

In this session, Xie discusses how to effectively work with high-net-worth clients — covering their concerns and what influences their decision-making. She also discusses the value of wealth management in insurance as well as current industry trends in Mainland China.

Presented in Mandarin.

Marketing | Language

2 – 5 p.m. (Doors open at 1:15 p.m.)

MAIN PLATFORM

CC:W / Exhibit Hall B / Overflow Room: CC:W / English Bay Ballroom A

Presiders	Ross Vanderwolf, CFP, and Brian D. Heckert, CLU, ChFC
Client Engagement Strategies	Ed Tate
The Thread That Never Breaks	Mark J. Hanna, CLU, ChFC
Be Prepared	Captain Chesley Sullenberger
A Journey Worth Taking	Regina Bedoya, CLU, ChFC
Break	
Smart Failure in a Fast World	Professor Eddie Obeng
Full Contact Sudoku	Mick Colliss
5 Seconds… Go!	Mel Robbins

8 – 10 p.m. (Doors open at 8 p.m. Entertainment begins at 8:30 p.m.)

PARTY ON THE PLATFORM

CC:W / Exhibit Hall BC

Enjoy your last night in Vancouver with the best party of the 2016 MDRT Annual Meeting. The Party on the Platform celebrates the close of another great meeting with an evening of music and dancing featuring the unique sounds of Ten Souljers.

Drinks and snacks are available for purchase. Because MDRT supports a responsible drinking policy, all MDRT-sponsored receptions will include a choice of nonalcoholic beverages.

No one under 21 years of age will be admitted. Alcohol will not be served to anyone under 21 years of age.

SPEAKERS

Bhupinder S. Anand, ACII, Dip PFS, is a 20-year MDRT member with four Court of the Table and 15 Top of the Table qualifications. He is a regular speaker at MDRT events and has served on several MDRT committees. As managing director of Anand Associates Ltd. and a renowned international speaker, Anand is sought after for his expertise in creative positioning and simplifying sales concepts. He leads the AdvisorMasterClass.com training program, in which he shares his practical techniques to help advisors accelerate their performance. Anand has twice been named the U.K.'s Independent Financial Adviser of the Year and Best IFA in the Capital.

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Nikhil Jitendra Anandpara, CFP, CII, is a 14-year MDRT member with six Court of the Table and three Top of the Table honors. He serves as executive director of Anandpara Wealth Management and has been a member of the Life Insurance Corporation of India's prestigious Corporate Club for eight years. Currently, Anandpara serves as State Chair of the Member Communication Committee in South Asia.

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Corey Lee Anderson is a four-year MDRT member. He joined Secura Consultants in March 2000 as an assistant in new business; in 2003, he transitioned to being the in-office everyday risk manager. In this role, his primary focus is helping advisors and their clients review and implement plans. In 2012, he was named Young Advisor Leader of the Year by the National Association of Insurance and Financial Advisors, which recognizes one outstanding advisor nationwide under the age of 40 each year.

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Brian H. Ashe, CLU, is a 45-year MDRT member with 15 Court of the Table and four Top of the Table qualifications. An MDRT Past President, his work is concentrated in estate conservation, retirement planning, employee benefits and business insurance strategies. A popular speaker, Ashe has addressed groups around the world. He currently writes the "Back Page" column for *Advisor Today*, and his comments have appeared in the *Wall Street Journal*, *Money* magazine, the *Chicago Tribune*, *Crain's Chicago Business* and more — as well as on more than 60 radio stations and 95 TV stations.

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Guy E. Baker, MSFS, CLU, is a 46-year MDRT member with six Court of the Table and 38 Top of the Table honors. He qualified for MDRT his first full year with Pacific Life, first qualified for Top of the Table at age 32, and served as President in 2011. He has been a registered investment advisor since 1993, working to solve clients' retirement issues. An author of many books as well as an internationally known speaker, Baker is completing a Ph.D. in retirement planning and investments through the American College. He is a member of the first cohort.

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Robert M. Ball began his life insurance career with Connecticut General in 1978. From 1981 to 1998, he was a top general agent for Guardian, where he grew a scratch operation into a master agency. He later served as president of LEAP Systems Inc. for five years. Most recently, he invented and helped launch a sales, marketing and training platform known as The Living Balance Sheet. Ball's longstanding reputation as a teacher is founded in his passion for the life insurance industry and in helping agents discover how to properly message the value of their products and services.

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Bill Beausay is the former director of research and development at the Academy of Sports Psychology, the author of nearly 20 books with worldwide circulation over 1 million in a half-dozen languages, and a professional speaker and trainer. Beausay did his doctoral work at the University of Toledo and spent 10 years in a professional clinical practice before becoming a writer and international speaker on topics of personal growth and professional success. In the early '90s, he wrote three bestselling and influential books on raising boys and girls. He literally "wrote the book" on raising millennials, and nobody knows them better.

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Regina Bedoya, CLU, ChFC, is the 2016 Nominee to the MDRT Executive Committee. She is a 22-year MDRT member with six Court of the Table qualifications and a Diamond Knight of the MDRT Foundation. Bedoya is president of RB Financial Advisors, a financial consulting firm specializing in retirement and insurance planning. Bedoya's volunteerism within MDRT includes speaking at several Annual Meetings, at an MDRT Experience and Global Conference, and at international industry conferences. She has been the recipient of the Irvin Konter Award, was named Prudential Palm Beach's Agent of the Year twice, and is the recipient of the American Free Enterprise Companion Medal awarded by Palm Beach Atlantic University

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Douglas John Bennett, Dip PFS, is the owner of DB Financial, a small financial services firm based south of London, England. His business consists of three advisors and a small part-time support staff. Bennett is a keen advocate of Lifestyle Financial Planning, and wholeheartedly believes "Life is not a rehearsal." He is a nine-year MDRT member with two Court of the Table qualifications and has served on numerous committees, traveling as far as Singapore and New Delhi to give back to MDRT.

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Jane E. Blaufus, CLU, brings to the table more than 25 years of expertise in the financial services sector as an advisor, manager and executive responsible for the development and implementation of sales and marketing training, as well as management and staff development. She has worked with London Life, Great-West Life, Clarica and Sun Life Financial. Today, she is a bestselling author, keynote speaker, business coach, highly sought-after consultant to the financial services industry and guest expert on national TV and radio.

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David Braithwaite, Dip PFS, is an eight-year MDRT member with three Court of the Table and three Top of the Table honors. He has been a financial advisor for more than 20 years and currently runs a firm based in the United Kingdom. He is regularly called upon by the media for expert comment, and has appeared on BBC Breakfast, ITV and BBC radio. He also contributes articles for national and local industry publications and has a regular weekly column in a local newspaper.

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D. Scott Brennan, of South Bend, Indiana, is a Past President of the Million Dollar Round Table. A member of the Quarter Century Club, as well as a past qualifier for Court of the Table and Top of the Table, he has been a speaker at more than 10 MDRT meetings. Brennan is a graduate of Indiana University. He is a past president of The Forum 400, a longtime member of the Association of Advanced Life Underwriting and a trustee of the NAIFA–Indiana board. Brennan and his wife have been married 32 years and are the proud parents of two adult daughters and grandparents of two grandsons.

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Brad Bueermann, CEO of FP Transitions, is a nationally recognized speaker and thought leader on matters of business value and equity management for independent financial professionals. Bueermann has been active in the merger and acquisition market for most of his career, beginning with Citibank in Milan, Italy, before moving on to ventures with the Christie Group, as well as private brokerage. He is the creator of FP Transitions' Comprehensive Valuation Report, the industry's standard for valuation, relying on the largest proprietary database of independent financial businesses in the U.S.

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Caleb J. Callahan, CFP, is a principal of ValMark Financial Group, serving as chief operating officer and executive vice president. He holds a degree in finance and economics from the University of Akron. He also received executive leadership training from Harvard Business School. Callahan is a Certified Financial Planner and industry author/speaker. He has contributed to such publications as the *Wall Street Journal* and *Bloomberg-Businessweek* and has published articles in in trade journals such as *Estate Planning Magazine* and the *Journal of Financial Service Professionals*. In late 2015, he testified on the DOL fiduciary rule at the Department of Labor's public hearing and again before the United States Congress.

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Pedro Camarena is a 16-year MDRT member with four Court of the Table qualifications and one Top of the Table honor. He is founder of Camarena Grupo Asesores S.C., where he dedicates himself to serving entrepreneurs and high level executives with their life insurance, savings and retirement needs. He is founder and president of Atlantis Group and a member of Seguros Monterrey New York Life's Consejo de Ventas.

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Dr. Caroline Casey is both an adventurer and business woman whose passion for leading a life without limits and labels is truly contagious. Since making a life-changing decision at 28 to leave her successful career as a management consultant and travel across India on an elephant, Dr. Casey has been committed to building a global movement — what she calls the "new green movement" — to build an equal society for the 1 billion people in the world with a disability. She has collaborated with some of the world's leading organizations and CEOs to further inclusive business principles.

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Bill Cates, CSP, CPAE, president of Referral Coach International, is widely recognized as the financial services' foremost expert in building a thriving referral-based business. His books, "Get More Referrals Now!" and "Don't Keep Me a Secret!" have revolutionized the way financial professionals acquire clients through referrals. His latest book, "Beyond Referrals," is a groundbreaking next step in client acquisition strategies. The creator of "The Referral Advantage Program" and "The Referral Champions System," Cates has seen his work featured in Success magazine, *Entrepreneur* magazine, *Selling Power* and the *Wall Street Journal*, and his own business featured in Money magazine.

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Tim Cestnick, FCA, FCPA, enjoys a reputation as one of Canada's most respected experts and public speakers in the area of tax and personal finance. After founding one of Canada's leading wealth advisory firms, WaterStreet Family Offices, Cestnick sold that business to Scotiabank in 2010 and is currently managing director, advanced wealth planning, for Scotiabank Global Wealth Management. He consults and speaks in all areas of personal finance. Cestnick is tax columnist for the *Globe & Mail*, Canada's national newspaper, has authored 18 bestselling books, and is a regular contributor and on-air personality on the best-known money shows on radio and television.

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Catherine Chee Keng Lian, FChFP, MBA, is a 20-year MDRT member. She is a director at the Great Eastern Life Assurance Company Limited and also operates Catherine Chee & Associates, where she provides clients with financial solutions to fulfill their desired financial goals, achieve peace of mind and protect against the cost of dying too early, becoming disabled or living too long.

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Hiromichi Chiba, AFP, TLC, an 11-year MDRT member, joined AXA Life Insurance Company Ltd. in 2003. He serves his clients by assessing and providing life planning to meet their individual needs and goals. For 13 consecutive years, Chiba has been recognized as a top performer at AXA.

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Wing Man Chin is a nine-year MDRT member and regional director of Prudential Assurance Company Ltd. He holds platinum-level leadership status as an international member of the Association of Accountants and Financial Professionals in Business. He was awarded the Hong Kong Management Association's Outstanding Young Salesperson Award in 2002.

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Russell Collins, Dip LI, operated as an insurance financial advisor, with a major emphasis in the business insurance market, from the time he entered the financial services industry in 1971 until his retirement in 2010. Since that time, he has conducted a training/mentoring business, "Risk Insurance Communications Skills," within the Australian industry. A 43-year MDRT member, he recently published a book — the first of its kind within the financial services industry in Australia — "Skills That Succeed – A Communication Guide for Risk-Based Financial Advisers."

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Mick Colliss is an author, writer, rugby commentator, emcee, guest speaker and modern day poet. He was also the vice captain of the first ever Australian sudoku team and traveled to India to compete at the World Sudoku Championships.

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Brad Davidson, a principal with Spardata and managing partner of Unique Asset Partners LLC, has more than 25 years' experience valuing privately owned businesses, limited partnerships, oil and gas interests and other hard-to-value assets. In 2014, Davidson wrote the "Unique Asset Road Map." His firms offer management services to those who choose not to manage unique assets themselves and consulting services to fiduciaries seeking to reduce their unique asset-related risk and increase profits.

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Justin J. Deges, FICF, LUTCF, is an eight-year MDRT member with one Court of the Table qualification. Several times during his 10 years as an agent, Deges has finished as the top producer for his company in overall life insurance production, most life applications, most life volume, most life premium and most long-term care applications. A former school teacher, Deges continues to educate and motivate while advising his clients on all matters pertaining to their financial security. Growing up on a small farm in northwest Kansas gave Deges a competitive edge in work ethic amongst his peers.

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Tracey Karen Diana Devonport is a 22-year MDRT member with 22 Top of the Table honors. Devonport is passionate about the financial planning industry and is a regular guest on financial programs in South Africa. She is the author of "Poor No More" and runs a successful wealth management practice. She was Lebone's Business Woman of the Year in 1998 and attributes her success to the "caring gene" all great financial planners carry.

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Krish Dhanam was born in the coastal town of Vizag, in Andhra Pradesh, India. He finished his MBA at the Institute of Management Technology in 1984 and migrated to the United States in 1986. He is the author of "The American Dream from an Indian Heart" and "From Abstracts to Absolutes," and contributing author to Zig Ziglar's "Top Performance." His latest book, "Hardheaded & Softhearted," co-written with the former president of Microsoft, Rick Belluzzo, is being used as culture-transformation curriculum globally.

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James. V. Durkin, CFP, CLU, President of the MDRT Foundation, is a 30-year MDRT member and a Legion of Honor Excalibur Knight-level donor of the MDRT Foundation. He is also a member of its Inner Circle Society, a distinguished group of donors who support the MDRT Foundation. His MDRT leadership roles include serving on multiple Foundation committees and directly influencing the programs and projects that support those served by the grant programs. He has received various grants from the Foundation for his contributions, including a Quality of Life grant for his work with the Cystic Fibrosis Foundation and one for the Alaska AIDS Vaccine Ride.

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Bo Eason is a former NFL standout, acclaimed Broadway playwright and performer, and presence/story coach to some of the most successful people in the world. He wrote and performed the play "Runt of the Litter," which has toured more than 50 cities nationally and was named "one of the most powerful plays in the last decade" by the New York Times. Eason is currently adapting the play for the big screen.

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Brad Elman, CLU, is a 24-year MDRT member with 13 Court of the Table qualifications and one Top of the Table honor. He is a five-time MDRT Annual Meeting speaker, including the 2013 Main Platform, and a two-time MDRT Divisional Vice President. Elman is regularly sought out by the media for information on consumer finance. He is a frequent guest on the NBC Bay Area News, and he writes for and is regularly quoted in many media outlets, both inside and outside the financial services industry. Elman's true passion is volunteering in the community; he spends the majority of his time working with children with developmental disabilities.

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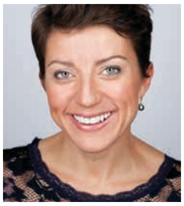

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Warren Macdonald's life's boundaries were redefined in April 1997 after his accident on North Queensland's Hinchinbrook Island. Climbing to the island's tallest peak, he became trapped beneath a one-ton slab boulder in a freak rock fall. He was rescued two days later, only to undergo the amputation of both legs at mid-thigh. Just ten months later, he climbed Tasmania's Cradle Mountain using a modified wheelchair. In February 2003, he became the first double above-knee amputee to reach the summit of Africa's tallest peak, Mt. Kilimanjaro, and more recently, he created history once again in an ascent of America's tallest cliff face, El Capitan. McDonald's first book, "A Test of Will," is an Australian bestseller, and he has appeared on numerous news and current affairs programs, including "Larry King Live" and the "The Oprah Winfrey Show."

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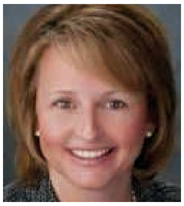

Cheryl Robertson, J.D., is president of The Corporation for Social Security Claiming Strategies, an organization she founded to educate advisors about the nuances of Social Security retirement benefits and strategies. CSSCS was launched to provide advisors with the knowledge necessary to advise clients on how best to claim benefits and, more importantly, how those benefits can play a seminal role in the sustainability of retirement income plans. CSSCS recently received National Underwriter's Elite Award for market innovation and has been featured in numerous national publications.

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Walton W. Rogers, CLU, ChFC, served as MDRT President in 2009 and is a 41-year MDRT member with three Court of the Table honors. He has served as a member or Chair of numerous MDRT committees and task forces and is a member of the MDRT Foundation's Excalibur Society. He has participated in several major MDRT activities, including Habitat for Humanity home builds and many Phonathons. In the industry, he served twice as president of the Annapolis Association of Insurance and Financial Advisors, and he is a 15-time recipient of Baltimore's Agency Leader Award. He is active in his community as a past president of the Annapolis Rotary Club and the Annapolis Woodworkers Guild. He also is a six-year veteran of the Maryland Air National Guard.

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Ana Sofia Rodriguez, MBA, is an 11-year MDRT member with two Court of the Table qualifications. She qualified for the first time at age 25, becoming the youngest female member to qualify from Latin America. Rodriguez has served on several committees, including serving as Assistant Chair for the 2015 Annual Meeting Program Development Committee. Rodriguez also currently serves as Trustee for MDRT Foundation. She is an associate director at Grupo Inverseguros and represents the second generation in the family owned insurance firm. Rodriguez has served as a board member of the *National Association of Insurance and Financial Advisors*. She is past president of Kiwanis Las Perlas, non-profit volunteer organization comprised entirely by female professionals. She has participated as a speaker in multiple seminars for women on the topic of professional image and marketing.

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Marci Rossell electrifies audiences nationwide, speaking on the nexus of economics, politics, culture and the media. Her animated style was honed when she served as the popular, lively chief economist for CNBC in the months immediately following September 11th. She takes complex economic issues and makes them relevant to people's lives, families and careers. Prior to her career in broadcast journalism, Rossell served as corporate economist and investment spokesperson for Oppenheimer Funds, one of the nation's largest mutual fund companies. Rossell began her career as an economist with the Federal Reserve Bank of Dallas. She earned a Ph.D. in economics from Southern Methodist University.

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Barbara Rozgonyi leads CoryWest Media, a strategic marketing consultancy that attracts attention, builds brands and connects communities. Noted as a top 50 content marketing influencer on Twitter, Rozgonyi was selected as one of two U.S. reporters to cover Social Media Week Berlin. The founder of Social Media Club Chicago, she publishes wiredPRworks.com and contributed the "Personality + Reputation" chapter in "Success Secrets of the Online Marketing Superstars" and the LinkedIn chapter in "Success Secrets of the Social Media Marketing Superstars."

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Lawrence Sarbit is CEO and chief investment officer for Sarbit Advisory Service. Starting his career in 1979 as an analyst, Sarbit went on to become a portfolio manager for Investors Group before managing the U.S. Growth Fund from 1987 to 1998. By the time of his departure from Investors Group, he was managing over USD 3 billion in assets. In 1999, Sarbit launched the AIC American Focused Fund, which he managed until 2005. Undeterred by industry fads, Sarbit is one of Canada's most highly respected asset managers, returning above average gains throughout his career by following his successful investment philosophy.

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Stuart Shee Yew Kuen, BBA, is an 18-year MDRT member and founder of Advisors in-Sync. He has served in various committees within the Round Table, including MCC Chair for Zone 5. A highly regarded speaker, he has spoken in more than 30 cities across 15 countries on various sales and agency leadership platforms, including the World Critical Illness Congress and various MDRT platforms. An associate trainer with The Kinder Brothers International (KBI) and Leadership Management International (LMI), Shee Yew Kuen also conducts workshops on sales, leadership and master agency building.

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John Sileo lost his USD 2 million business — and two years of his life — to cyber theft. Armed with firsthand experience, he's spent the last decade bulletproofing businesses from a similar fate. Sileo's clients include the Pentagon, Visa, The Hartford, Charles Schwab, FDIC, Homeland Security and hundreds of businesses of all sizes. An award-winning author and expert in the human element of cyber security, Sileo has appeared on 60 Minutes, Fox Business and Anderson Cooper 360. His great love is protecting entrepreneurs like himself; his great passion is spending time with his wife and daughters.

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Marc A. Silverman, CFP, ChFC, began his financial planning career in 1983 and formed Silverman Financial in 1989. A 32-year MDRT member with five Court of the Table and 22 Top of the Table honors, Silverman has a diversified client base including public corporations, closely held businesses, individuals, trusts and estates. His motto is "Promise a lot and deliver more." Silverman earned his master's degree in business administration from the University of Miami and is a past president of the University of Miami Alumni Board School of Business. He is also past president and board member of the Miami Chapter of the Society of Financial Service Professionals and a past Chair of Top of the Table.

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Kyo Wook Son, CFP, is a 13-year MDRT member who served as Zone Chair of the MDRT Korea Chapter and Chair of the Membership Communication Committee for Korea and Japan. He focuses on estate and retirement planning and is currently growing his business in financial consulting for wealthy clients. In 2014, he published his book "Insurance Dictionary" while working on asset management, investment and financial planning.

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Curt Steinhorst is the founder and president of The Promentum Group, a communications consultancy that crafts messages for today's distracted audiences. As its lead consultant, Steinhorst has helped an impressive variety of companies and public figures — from preparing Johnny Manziel for his Heisman trophy acceptance speech (described by ESPN as "the greatest in history") to advising the largest record label in country music on its marketing to digital consumers. As a leading voice on strategic communications in the age of distraction, Steinhorst has spoken across the globe to audiences that include Fortune 100 companies, global non-profits, national associations and professional sports teams.

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Don Stephens founded Mercy Ships in 1978 with the purchase of the Anastasis, where he and his family lived for 10 years. As president, Stephens directs and leads more than 1,000 professional volunteers from 45 nations with offices in 16 countries. He's also the voice of "The Mercy Minute" — a radio broadcast aired on more than 840 stations daily — and the author of three books: "Trial by Trial," "Mandate for Mercy" and "Ships of Mercy." In 2009, he was awarded the International Humanitarian of the Year award from Variety International.

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Bill Strickland has used his innovative arts and training centers to transform the lives of thousands of impoverished adults and teenagers. As president and CEO of the Manchester Bidwell Corporation — a jobs training center and community arts program — he and his staff work with corporations, community leaders and schools to help disadvantaged kids and adults build a better future. Recently, Strickland was named as one of the 25 members of the White House Council for Community Solutions by President Barack Obama. For years, he has shared his unshakable message about leadership, self-worth and the intrinsic ability in all of us to achieve remarkable transformation in our lives. Strickland is also the author of "Make the Impossible Possible" and a recipient of the White House's Coming Up Taller Award.

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Captain Chesley B. ("Sully") Sullenberger III, named one of the world's 100 most influential people by *Time* magazine, is an international hero, propelled into the spotlight after safely guiding a US Airways jetliner to an emergency landing on the icy Hudson River. A consummate leader, Sullenberger shares timeless management principles and the lessons from his life that prepared him to handle the "Miracle on the Hudson." He discusses with audiences how education, teamwork, preparation and creating a culture of safety can improve any organization.

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Ed Tate's success in business has spanned more than two decades. For 14 years, he was a successful national account executive selling over USD 500 million in products and services to corporations and entrepreneurs throughout the United States. He co-created two business units that produced over USD 1.25 billion in revenue. Currently, he is principal of Ed Tate & Associates LLC, a professional development firm that provides keynote and endnote presentations and workshops, as well as in-person and do-it-yourself tools and expertise on leadership and business presentation skills. He is the author of "Speaker's Edge: Secrets and Strategies for Connecting with Any Audience" and "Motivational Selling: Advice on Selling Effectively, Staying Motivated and Being a Peak Sales Producer."

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Audrey Thomas, CSP, better known as "Organized Audrey," is a prolific speaker who holds the CSP designation, given to less than 10 percent of professional speakers. Specializing in the areas of increasing productivity, maximizing technology and balancing work and life, Thomas' messages are in high demand in the financial and insurance industries. She's also authored several books, including "50 Ways to Leave Your Clutter" and "The Road Called Chaos." With more than 20 years' experience, Thomas' bottom line is to leave you better than she found you.

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Ron Tite is CEO of The Tite Group, a content marketing agency based in Toronto. He was named one of the "Top 10 Creative Canadians" by *Marketing* magazine and has been an award-winning advertising writer and creative director for some of the world's most respected brands, including Air France, Evian, Hershey, Microsoft and Volvo. He addresses a variety of topics surrounding branding, corporate strategy, creativity, content and social media. Tite's presentations are not only information-packed, they're also infused with his unique humor which is guaranteed to have you laughing while you learn.

Speaker's Spotlight (c/o Kelly MacDonald)
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Doug Towill, MBA, is senior vice president of strategic business development at CI Investments — the leading independent asset manager in Canada. He has dedicated his 30-year career to his passion: consulting business professionals. Since 1997, Towill has led groups that provide cutting-edge solutions to individual financial advisors, advisor teams and financial services organizations worldwide. Towill has addressed countless audiences on issues clients face and how advisors, as trusted professionals, can best help them. His high-energy presentations provide both the impetus for change and the practical tools and techniques necessary to make substantive and sustained change a reality.

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Yasuhisa Ueki, CFP, TLC, is a 16-year MDRT member with five Court of the Table and three Top of the Table honors. He joined Tokio Marine & Nichido (Anshin) Life Insurance in 1999 after working as the top sales representative at the Ricoh Company. Ueki serves a wide range of clients, including individuals and businesses. He has generated three new life sales per week for 50 weeks and established one new life sales per week for more than 300 weeks.

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Venkateswara Rao Vakalapudi is a 14-year MDRT member with one Court of the Table and six Top of the Table honors. He is a senior advisor with more than a decade of experience in the life insurance and investment field. He has been India's leading premium generator for the Life Insurance Corporation of India (LIC) for the past five years.

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James J. Van Ham, CLU, CFP, is a 13-year MDRT member. He began his career in 1977, later serving as an agency manager before his current role as an independent advisor with Lovelace and Associates. Van Ham is a past president of both NAIFA-Illinois and NAIFA-Du Page, and currently serves on the NAIFA Board of Trustees. A Bronze Knight of the MDRT Foundation, he was also the 2006-2009 Midwest Chair for the MDRT Membership Communications Committee and a past president of the Northern Illinois GAMA. Some of the various industry awards he has received include: the National Quality Award, National Sales Achievement Award, National Health Insurance Quality Award and National Multi-Line Sales Award.

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Erik Wahl is an internationally recognized graffiti artist, bestselling author and entrepreneur. Wahl's on-stage painting seamlessly becomes a visual metaphor to the core of his message, encouraging organizations toward profitability through innovations and superior levels of performance. His list of clients includes AT&T, Disney, London School of Business, Microsoft, FedEx, Exxon Mobil, Ernst & Young and XPrize; Erik has even been featured as a TED presenter. Erik's bestselling business book "Unthink" was hailed by Forbes magazine as "the blueprint to actionable creativity" and by *Fast Company* magazine as "provocative with a purpose."

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Astuti Widyawati is a two-year MDRT member with one Top of the Table honor. She has served as a PGA volunteer and currently works for Manulife.

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Kooi Fong (Christine) Wong is a four-year MDRT member with one Court of the Table honor. She has served in numerous volunteer positions within MDRT and is currently a Country Chair in the Member Communications Division.

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Zheng Yu (Nick) Wu is a 10-year MDRT member with one Court of the Table honor. Wu is the agency manager at Sino-Us United MetLife Insurance Company Limited, Beijing Branch, and currently serves as Membership Communications Committee (MCC) Zone Chair for China. His presentations on simplifying sales strategies have inspired and helped countless agents in China.

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Fang Xie is an 11-year MDRT member with two Court of the Table honors. In recent years, she has focused on wealth planning and provided family asset allocation strategies for high-net-worth clients. Her services include long-term stabilized cash flow planning, business owners assets security isolation planning and wealth inheritance planning.

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Red Hong Yi is a Malaysian artist-architect who is known as "the artist who likes to paint, but not with paint brushes." Her first "unconventional" artwork was the portrait of artist Ai Weiwei using hundreds of thousands of sunflower seeds. In January 2012, she was videotaped dribbling a basketball in red paint into a giant portrait of basketballer Yao Ming. The video went viral around the world and was followed by several other videos of the creation of her paintings. Her creativity has resulted in her artwork being featured in the *Wall Street Journal*, the *Huffington Post*, CNN and many other outlets. She was named one of the "12 Brilliant Malaysians 2013" by *Esquire Malaysia* and was presented with the "Young Entrepreneur Award" by the Malaysian Australian Alumni Council.

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Thomas W. Young, CLU, ChFC, a 24-year MDRT member with five Court of the Table and four Top of the Table qualifications, is the founder and president of 1st Consultants Inc. He is also a published author, professional speaker and radio personality. Young is a former national field trainer for LEAP Systems Inc. and is also a certified life coach and human behavior consultant. Young is a member of NAIFA, the Society of Financial Service Professionals and the National Ethics Bureau.

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E. Dennis Zahrbock, CLU, CFP, is a 44-year MDRT member with 21 Top of the Table honors. He was the 2013 Chair of Top of The Table and has spoken at many MDRT meetings, including two Main Platform presentations. He and his partner, MDRT member Sarah J. Kaelberer, CFP, ChFC, operate Business & Estate Advisers Inc. They provide comprehensive financial planning services, 401(k) design, administration and funding services, and transition planning services. Together they manage more than USD 300 million of client assets, administer more than 75 401(k) plans, and have more than USD 500 million of life insurance in force on their clients.

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WELCOME TO THE CONNEXION ZONE!

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Here you will find an agenda for each day, a floor plan to help you locate key areas throughout the ConneXion Zone®, information on presentation topics and speakers, and an exhibitor listing. If you want to hear a particular ConneXion Zone® speaker, there is a speaker listing where you can find the speaker's scheduled presentation days and times.

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Speaker Zones

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Big Idea Theater

Located in the back of the ConneXion Zone®, this big stage with its big screen brings you the conference buzz from Twitter along with a number of panel discussions and Q & A sessions.

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MDRT is built on the concept of sharing ideas. Great Conversations allows you to meet and learn from some of MDRT's experienced top producers.

Exhibitor Zones

Stop by and meet with exhibitors to learn how to grow your practice.

Technology Zone

Something is always happening in the Technology Zone, providing you with an amazing technology experience in three unique settings:

Technology Classroom

The Technology Classroom features a variety of learning opportunities. Hear how fellow members optimize their use of technology, learn how to take advantage of all the secrets found on MDRT.org, find out about apps that can help you succeed in your personal and professional lives, see how the MDRT Branding Toolkit can help you showcase your achievements and find out how you can improve your Linked In-profile.

Technology Playground

Get ready for an immersive experience at the Technology Playground. Check out the coolest new gadgets and apps such as artificial intelligence on devices, health and fitness wearables, virtual reality tools and gesture-based technology. Discover how these new tech tools will impact your life and your practice.

Technology Bar

Want to learn how to use the meeting app? Would you like to find out how to use Google Analytics? To find out the answers to these and a multitude of other tech questions, sidle up to the Technology Bar for some hands on learning and to hear from go-to experts with their fingers on the pulse of the tech industry and knowledge of best tech practices.

You can find more information on the Technology Bar and Technology Playground in the daily schedules starting on page 88.

Top of the Table and Court of the Table Connect:

Learn from members who have reached the higher levels of MDRT membership by attending these exciting events:

Court of the Table Connect

NEW

Sunday, June 12
10:30 a.m. – 12 p.m.

Top of the Table Connect

Tuesday, June 14
10 – 11:30 a.m.

Meet Your Meeting Sessions

Learn more about the enhancements and new programming available at this year's meeting.

Be sure to attend one of the **Meet Your Meeting sessions on Sunday, June 12**.

EXHIBITOR LISTING

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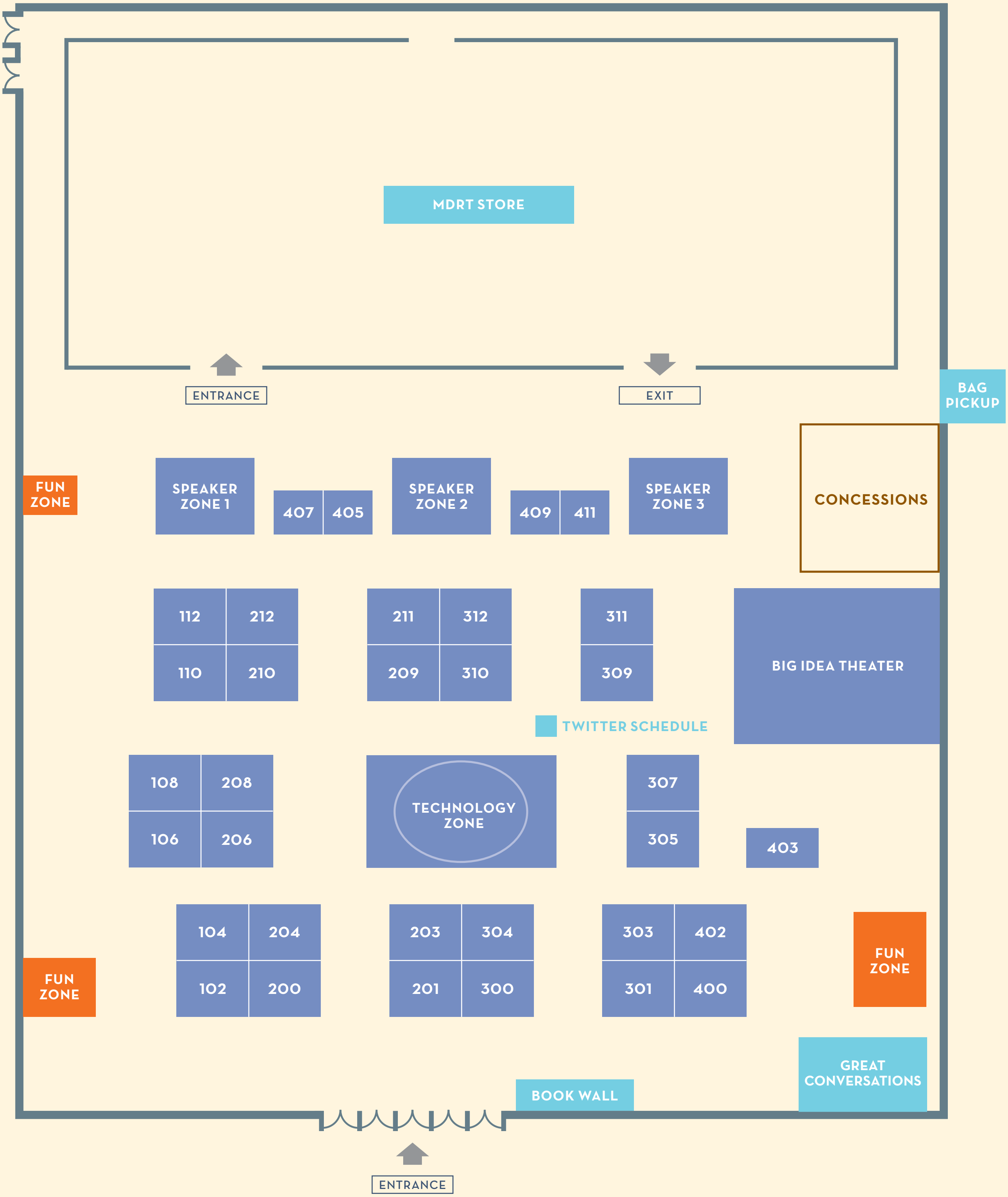
Pods are subject to change. Exhibit Floor Plan is located at the right. Exhibitor Descriptions are on pages 78–87.
Session Schedule is on pages 88–98. Speaker Index is on pages 98–107.

FLOOR PLAN

Vancouver Convention Center–West
Exhibit Hall A



EXHIBITOR AND SPONSOR DESCRIPTIONS

POD: **106**

You can't build a reputation on what you're going to do. Think about the areas of your life where you've fallen short – if you look critically, the breakdown is most often in the execution. The 12 Week Year is the most recognized execution system in our industry. Discover why!

1798 Holloway Drive, Suite B, Holt, MI 48842 USA

PHONE: 517-699-3570 **FAX:** 517-699-3588 **EMAIL:** michael@12weekyear.com or karen@12weekyear.com

WEBSITE: www.12weekyear.com

POD: **412**

Positioning yourself and your business as the undisputed expert, influential authority and in-demand celebrity makes you the individual that everyone wants to work with. This authority position moves you to new heights and makes marketing, selling and building trust with customers easier and quicker than ever before.

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EMAIL: clittle@advantageww.com **WEBSITE:** www.advantagefamily.com5

POD: **203**

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POD: 211

As The Real Life Company, we help families lead healthier and fuller lives. We aim to make insurance easier for everyone with quality financial advice and innovative products and services. We listen to customers to make sure we give them what they need.

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POD: 407

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PHONE: 610-526-1000 **TOLL-FREE:** 888-263-7265 **FAX:** 610-526-1454 **WEBSITE:** www.theamericancollege.edu

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POD: 210

Say goodbye to the daily grind that keeps you struggling and frustrated, feeling like you have to “do it all” when you only want to see people. That old, broken model of doing business is over. Andrea Bullard will show you how she has helped hundreds of producers go from MDRT to Top of the Table.

121 Boston Post Road, Sudbury, MA 01776 USA
PHONE: 978-443-5342 **EMAIL:** andrea@andreabullard.com **WEBSITE:** www.andreabullard.com

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POD: 305

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WEBSITE: www.ashbrokerage.com

asset-map® | platform

POD: 303

H. Adam Holt, founder of Asset-Map and Court of the Table producer, will share a vision of how to facilitate meaningful financial conversations with clients through visualizations of their current financial condition. A must-attend for financial professionals who are looking to create a renewed customer experience.

215 Presidential Blvd. 2nd Floor, Bala Cynwyd, PA 19004 USA
PHONE: 239-784-3492 **TOLL-FREE:** 888-664-8850 **EMAIL:** bridget@asset-map.com; adam@asset-map.com
WEBSITE: www.asset-map.com

CONTINENTAL
SECURING YOUR TOMORROWS

POD: 301

The Continental Group is a leading insurance and financial services intermediary. Continental offers worldwide advisors access to unique premium financing solutions for high value life insurance policies. Continental has operations spread across the UAE, Kuwait, India and Switzerland. Continental's presence, operational strength and experience helps advisors provide this innovative solution to their high-net-worth clients.

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WEBSITE: www.covenantgroup.com

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LIFE • HEALTH • RETIREMENT

POD: 312

Desjardins Insurance is the life and health insurance arm of Desjardins Group, Canada's largest cooperative financial group. With total assets of over USD 229 billion, Desjardins Group is ranked among the top five on Bloomberg's 2015 list of the World's Strongest Banks. Join us to learn about our innovative life and health insurance and retirement savings solutions.

95 St. Clair Avenue West, Toronto, ON M4V 1N7 Canada
TOLL-FREE: 1-877-906-5551 **EMAIL:** www.desjardinslifeinsurance.com

eFileCabinet

POD: **400**

eFileCabinet Inc. offers a suite of on-premise and cloud document management software and file-sharing services that enable companies to capture, store, manage, share and protect valuable data while meeting regulatory compliance requirements. With more than 12 years in the industry, eFileCabinet is the trusted choice for more than 135,000 users worldwide.

3300 W. Ashton Boulevard, Suite 400, Lehi, UT 84043 USA
PHONE: 801-374-5505 **TOLL-FREE:** 877-574-5505 **FAX:** 801-374-5506
EMAIL: cchristopherson@Efilecabinet.Com **WEBSITE:** www.efilecabinet.com

ExamOne®
A Quest Diagnostics Company

POD: **309**

ExamOne is committed to ensuring the underwriting requirement process is quick and convenient for applicants, agents and home-office personnel. Our services include data gathering, paramedical examinations, laboratory testing and consultative analytics, designed to assist life insurance companies in fair, objective evaluations on mortality risks of applicants.

10101 Renner Blvd., Lenexa, Kansas 66219 USA
PHONE: 877-933-9261 **EMAIL:** Matt.A.Bartkowiak@ExamOne.com **WEBSITE:** www.examone.com

FIFTH SEASON
FINANCIAL

POD: **208**

For clients dealing with advanced-stage illnesses, there may be a better alternative than selling policies through a life settlement. Fifth Season Financial's FLAG program is a unique solution that provides advances against the face value of a qualified client's life insurance policy, while still preserving a portion of beneficiary funds.

2777 Summer Street, Suite 304, Stamford, CT 06905 USA
PHONE: 203-914-1670 **TOLL-FREE:** 866-459-1271 **FAX:** 914-371-6807
EMAIL: adam.balinsky@fifthseasonfinancial.com **WEBSITE:** www.fifthseasonfinancial.com

POD: **204**

First Heartland is an independently owned broker-dealer, brokerage general agency and registered investment advisory. FHC is continuously focused on relationships and the changing needs of financial professionals, offering the product variety and services that others are unable to provide due to their ownership or ties to large companies.

1839 Lake Saint Louis Boulevard, Lake Saint Louis, MO 63367 USA
PHONE: 636-695-2800 **TOLL-FREE:** 800-444-7244 **FAX:** 636-695-2843
EMAIL: janderson@firstheartland.com **WEBSITE:** www.joinfhc.com

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POD: **112**

FMP Mortgage Investments Inc. is a full service mortgage brokerage specializing in syndicate mortgage investments. FMP enables consumers to invest directly into the proven Canadian real estate market alongside top development partners.

STEVLOC Management Inc. is an exempt market dealer providing investors access to the private capital market.

930 The East Mall, Etobicoke, ON M9B 6J9 Canada
PHONE: 416-998-4646 **EMAIL:** crandhawa@fmpmortgages.com **WEBSITE:** www.fmpmortgages.com

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POD: **403**

GAMA International is the only association dedicated to promoting the professional development needs and leadership skills of front-line leaders in the insurance, investment and financial services industry. Our commitment to providing members with research-based, world-class education and training resources is second to none.

1751 Pinnacle Drive, Suite 1125, McLean, VA 22102 USA
PHONE: 571-499-4300 **TOLL-FREE:** 800-345-2687
EMAIL: gamaweb@gamaweb.com **WEBSITE:** www.gamaweb.com

GPFIS

Grand Prospects Financial & Insurance Services

POD: **209**

Auchel World/GPFIS is a global organization specializing in investing, asset management, financial planning and risk management products and services. With over 20 years of advanced expertise, Auchel World/GPFIS are industry pioneers offering innovative one-stop financial & personalized insurance solutions to both financial and insurance professionals and high-net-worth clients across the globe.

18631 E. Gale Avenue, City of Industry, CA 91748 USA
PHONE: 800-340-1688 **FAX:** 626-820-6179 **EMAIL:** gpfis@gpfis.com **WEBSITE:** www.gpfis.com

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Hanleigh

POD: **212**

Hanleigh provides high-limit disability income protection for elite corporate, entertainment, and sports risks. For over 30 years, Hanleigh's reputation has been unmatched as innovators of products such as GSI and Key Person coverage. Hanleigh team members are industry experts who meet the needs of your clients through innovative solutions.

50 Tice Blvd, Suite 122, Woodcliff Lake, NJ USA
PHONE: 413-364-6917 **TOLL-FREE:** 800-443-2922 **FAX:** 201-505-1051
EMAIL: bryan.musa@hanleighinsurnace.com **WEBSITE:** www.hanleighinsurance.com

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intellect SEEC

POD: **310**

Intellect SEEC is one of the world's leading providers of insurance software with an extensive portfolio covering distribution, underwriting and claims. We have been developing innovative insurance solutions to lower operating costs and increase premium volumes and margins for more than two decades. We have built strategic relationships with 30+ global insurance carriers.

30 Montgomery Street, Suite 700, Jersey City, NJ 07302 USA
PHONE: 732-508-4443 **EMAIL:** barbara.stanton@intellectdesign.com **WEBSITE:** www.intellectseec.com

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LIFE HAPPENS
A NONPROFIT ORGANIZATION

POD: **411**

Life Happens is a nonprofit organization dedicated to helping Americans take personal financial responsibility through the ownership of life insurance and related products, including disability and long-term care insurance. Life Happens reminds people of the important role insurance plays.

1655 N. Fort Myer Drive, Suite 610, Arlington, VA 22209 USA
PHONE: 202-464-5000 **TOLL-FREE:** 888-543-3777 **FAX:** 202-464-5011
EMAIL: aenglert@lifehappens.org **WEBSITE:** www.lifehappens.org

MAXIMIZER CRM

POD: 108

Since 1987, Maximizer has delivered customer relationship management (CRM) software and professional services, meeting the needs, budgets and access requirements of small- to medium-sized businesses. Simple, configurable and affordable, Maximizer CRM enables organizations in all industries and markets to increase sales, enhance marketing and improve customer service while boosting productivity and revenues. Headquartered in Vancouver, with worldwide offices and business partners, Maximizer Services Inc. has sold over one million licenses to more than 120,000 customers.

208 West 1st Street, Vancouver, BC V5Y 3T2 Canada
PHONE: 604-601-8000 **TOLL-FREE:** 1-800-804-6299
EMAIL: nicole.e.steele@gmail.com **WEBSITE:** nicole.e.steele@gmail.com

PLATINUM SPONSOR

MetLife

POD: 304

MetLife Inc. is a leading global provider of insurance, annuities and employee benefit programs. Through its subsidiaries and affiliates, MetLife holds leading market positions in the United States, Japan, Latin America, Asia, Europe, the Middle East and Africa.

11225 North Community House Road, Charlotte, NC 28277 USA
PHONE: 980-949-3312 **EMAIL:** jniles@metlife.com **WEBSITE:** www.metlife.com

NAIFA

POD: 405

NAIFA protects and promotes the critical role of insurance in a sound financial plan and the essential role provided by our professional agents and advisors. NAIFA's mission is to advocate for a positive legislative and regulatory environment, enhance business and professional skills, and promote the ethical conduct of our members.

2901 Telestar Court, Falls Church, VA 22042 USA
PHONE: 703-770-8100 **TOLL-FREE:** 877-866-2432 **FAX:** 703-770-8224
EMAIL: membersupport@naifa.org **WEBSITE:** www.naifa.org

National Christian FOUNDATION®

POD: 200

Since 1982, the National Christian Foundation (NCF) has served top advisors and their clients with the most innovative charitable giving solutions in the industry. As the nation's largest Christian grant-making organization, NCF specializes in strategies that leverage assets such as private business interests, real estate and other unique gifts.

11625 Rainwater Drive, Suite 500, Alpharetta, GA 30009 USA
PHONE: 404-252-0100 **TOLL-FREE:** 800-681-6223 **FAX:** 404-252-5177
EMAIL: info@nationalchristian.com **WEBSITE:** www.nationalchristian.com

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Ohio National Financial Services®

Life changes. We'll be there.®

POD: 300

Tracing its corporate origins to 1909, Ohio National markets a variety of insurance and financial products through more than 50,000 representatives in 49 states (all except New York), the District of Columbia, Puerto Rico and through affiliated operations in South America. Additional subsidiaries operate in New York and Connecticut.

One Financial Way, Cincinnati, OH 45242 USA
PHONE: 513-794-6100 **TOLL-FREE:** 877-665-2468 **FAX:** 513-794-4799
EMAIL: susan_mcdonald@ohionational.com **WEBSITE:** www.joinohionational.com

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CHARGING STATION SPONSOR

PACIFIC LIFE

For more than 146 years, Pacific Life has been helping to protect individuals and families from financial risks that can affect their investments, retirement savings, and businesses. Pacific Life offers life insurance, annuities and mutual funds, along with a variety of investment products and services, all of which provide the power to help you succeed.

45 Enterprise, Aliso Viejo, CA 92656 USA
TOLL-FREE: 800-800-7681 **EMAIL:** Chris.Cairns@pacificlife.com **WEBSITE:** www.pacificlife.com

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PARKLAND SECURITIES, LLC

MEMBER FINRA/SIPC

POD: 307

With a caring staff empowered to deliver personal, innovative support, Parkland Securities LLC partners with financial advisors committed to enhancing their clients' experience in an ethical, trustworthy manner. We provide comprehensive financial planning tools, solutions and services supporting our representatives' efforts in guiding their clients toward financial success.

300 Parkland Plaza, Ann Arbor, MI 48103 USA
PHONE: 888-744-6264 **TOLL-FREE:** 888-744-6264 **FAX:** 734-663-0213 **WEBSITE:** www.joinparkland.com

Pellegrini
team consulting

POD: 104

We train advisors throughout the U.S. and Canada to better utilize their staff by helping with time management and increasing overall productivity. We also help teams shake off old habits to become less complacent, more dynamic and ready for the next level.

8945 Aztec Drive, Eden Prairie, MN 55347 USA
PHONE: 952-829-5300 **FAX:** 952-829-5368 **EMAIL:** gina@pellegriniteam.com **WEBSITE:** www.pellegriniteam.com

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STRATEGIC COACH®

POD: 201

The Strategic Coach offers focusing programs for successful and highly motivated entrepreneurs. Currently, more than 3,500 entrepreneurs from more than 60 industries worldwide attend Strategic Coach programs. Participants meet quarterly to learn concepts and tools they can use to achieve greater freedom, simplicity, balance and confidence in all areas of their lives.

33 Fraser Avenue, Suite 201, Toronto, ON, M6K 3J9 Canada
TOLL-FREE: 888-387-3206 **FAX:** 416-531-1151
EMAIL: info@strategiccoach.com **WEBSITE:** www.strategiccoach.com

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Transpacific
泛亞財務保險

POD: 102

Transpacific Financial Inc., the largest Asian general agency in California with 2,000 contracted agents, is affiliated with IDA. The staff speaks English plus Mandarin, Cantonese, Korean or Japanese, and supports agents whose clients prefer working in their native language. Working with 40 carriers, Transpacific specializes in foreign national clients, estate planning and pension plans.

1045 W. Huntington Drive, #200, Arcadia, CA 91007 USA
PHONE: 626-447-7888 **TOLL-FREE:** 626-737-6035 **FAX:** 626-737-6035
EMAIL: sandy.wu@transpacificagency.com **WEBSITE:** www.transpacificagency.com

POD: 206

More than 10,000 baby boomers are retiring every day! To prospect with clients who are heading toward retirement, discover The Retirement Analysis Kit (TRAK). TRAK is a top-ranked educational tool and will expand your practice in the retirement marketplace. Learn how TRAK can take your practice to the Top of the Table!

883 SW Church Street, Dallas, OR 97338 USA
PHONE: 503-831-1111 **FAX:** 877-718-2693
EMAIL: Edward.Dressel@AskTRAK.com **WEBSITE:** www.AskTRAK.com

POD: 402

Leading in adventure hospitality management, the Waterfall Group delivers extraordinary outdoor adventures featuring wilderness destinations, marine and aviation expertise, seamlessly organized travel, regional cuisine and dedicated customer service. Founded in 1980, the Waterfall Group markets, operates and supports multiple lines of business nationally, from sport-fishing lodges in Southeast Alaska to sea-plane tours in the Florida Keys.

320 Dock Street, #222, Ketchikan, AK 99901 USA
PHONE: 805-870-3780 **TOLL-FREE:** 800-544-5125 **FAX:** 805-879-3787
EMAIL: carol@waterfallresort.com **WEBSITE:** www.waterfallresort.com

POD: 409

Eighty years strong, WIFS is the preeminent association dedicated to attracting, developing and advancing women in the insurance and financial services industry. More than 1,100 independent and registered representatives, advisors, CPAs, attorneys, industry partners and sponsors benefit from education, peer connection, mentorship, local chapters, recognition and leadership development.

136 Everett Road, Albany, NY 12205 USA
PHONE: 866-264-9437 **FAX:** 518-935-9232
EMAIL: office@wifsnational.org **WEBSITE:** www.wifsnational.org

SUNDAY MORNING

	SPEAKER ZONE 1	SPEAKER ZONE 2	SPEAKER ZONE 3
10 a.m.	MEET YOUR MEETING **Tsai Pei Hua** 瞭解您的會議（M） 了解您的会议（M）	MEET YOUR MEETING **Junji Yamaguchi** ミーティング・プログラムのご紹介　(J)	MEET YOUR MEETING **Chan Hyun Baek** 연차총회 프로그램 백 프로 활용법 (K)
10:30	COURT OF THE TABLE CONNECT **Peter Hill, ChFC** Maximizing Survivor Social Security	COURT OF THE TABLE CONNECT **Michael S. Ross** 70% of Widows Leave Their Advisors, Don't Be A Statistic	COURT OF THE TABLE CONNECT **Nikhil Jitendra Anandpara** Selling to the High-Income Market
10:55	COURT OF THE TABLE CONNECT **Mi Ah Bahk** 골든에이지로 가는 길-고품격 인생을 위한 은퇴 플랜 (K)	COURT OF THE TABLE CONNECT **Brad Myers** Benefits of Hiring a Business Coach	COURT OF THE TABLE CONNECT **Claudio Miguel Mejia** La Regla del 20/80 para un Retiro Financieramente Feliz (S)
11:20	COURT OF THE TABLE CONNECT **Robert Gawthrop, CFP, CLU** Member Author: One Page Presentations	COURT OF THE TABLE CONNECT **Sean Anthony Quigley, LUTCF** Member Author: The Cash Play–Capitalizing on the Opportunity Value of Cash	COURT OF THE TABLE CONNECT **Jayant Yeshwant Mahabole** रश्ते बनाते जाओ बीमा होता जाएगा (H)
11:45			**Andrea Bullard & Company** 3 Critical Keys to Catapult Your Business from MDRT to Top of the Table
Noon			

TECHNOLOGY BAR

10 a.m.	Get to Know Your iPad Inside & Out!
10:30 a.m.	MDRT Annual Meeting App
11 a.m.	Overview of Social Networks
11:30 a.m.	15 Must-Have Productivity Apps
12 p.m.	Tech and Solutions: Note Taking and Capturing Data – Speech and Handwriting Recognition
12:30 p.m.	MDRT Annual Meeting App
1 p.m.	Tips and Tricks on How to Tame Your Inbox
1:30 p.m.	Apps For Work/Life Balance
2 p.m.	Productivity Apps for Teams and Office Environment
2:30 p.m.	MDRT Annual Meeting App
3 p.m.	Tools for Sales & Marketing Teams
3:30 p.m.	Top 10 Apps-on-the-Go: Apps That Help When You Are OOO [Out-of-Office]

SUNDAY MORNING

BIG IDEA THEATER	GREAT CONVERSATIONS	TECHNOLOGY CLASSROOM	
MEET YOUR MEETING **Robert Waddell, RICP** Meet Your Meeting (E)		**MDRT Branding Toolkit**	10 a.m. 10:05 10:10 10:15 10:20 10:25
COURT OF THE TABLE CONNECT **George B. Pickett, J.D., CLU** Words That Work	COURT OF THE TABLE CONNECT **Robert B. Joki, CLU, ChFC / Ronald T. Staebell, CLU, MSFS** Study Goups	**Dahlia+** Apps for Personal and Professional Development	10:30 10:35 10:40 10:45 10:50 10:55
COURT OF THE TABLE CONNECT **Chuanphit Poontavee** เปลี่ยนชีวิตด้วย MDRT ตลอดชีพ (T)	COURT OF THE TABLE CONNECT **Charles E. McDaniels, CLU, ChFC** Succession Planning	COURT OF THE TABLE CONNECT **H. Adam Holt, ChFC** Asset Allocation Discussions with Clients	11 a.m. 11:05 11:10
COURT OF THE TABLE CONNECT **Hiroharu Tauchi** 期待値をコントロールする（J）	COURT OF THE TABLE CONNECT **Chou Chen-Ning** 經由FB蒐集有效名單 (M) 经由FB搜集有效名单 (M)	COURT OF THE TABLE CONNECT **Blake Colin Maurice Griffith** Reaching Affluent Clients by Partnering with Accountants and Lawyers	11:15 11:20 11:25 11:30 11:35 11:40
	Gene L. Mahn, CLU, ChFC FFREEDM	**Naoki Masuda** テクノロジーがもたらす保険営業の未来（J）	11:45 11:50 11:55
			Noon

TECHNOLOGY PLAYGROUND

TECHNOLOGY OF THE FUTURE, NOW: AI ON YOUR DEVICES

10–10:30 a.m., 2–2:30 p.m.

Alexa on Amazon Echo, Siri on Apple devices, and Cortana on Windows… More apps powered by AI are becoming available. We'll discuss what's available and how you can start incorporating AI technology into your life.

STAYING FIT & ACTIVE WHILE ON THE ROAD WITH APPS + WEARABLES

11–11:30 a.m.

FitBit, Apple Watch, Misfit Shine – there are many devices that can help keep you motivated to reach your fitness goals. Experiment with some of the most common apps and wearable technology that will allow you to stay fit.

TECHNOLOGY FORETOLD IN THE FILM *MINORITY REPORT*

12–12:30 p.m., 3–3:30 p.m.

Wearables, artificial intelligence and virtual reality are transforming every corner of our lives. They continue to expand, including gesture-based technology, robots, wearables, virtual reality, all foretold in the movie *Minority Report*. Learn how these cool technologies are impacting our lives.

WELLNESS TECHNOLOGIES FOR YOUR BODY, HOME & OFFICE

1–1:30 p.m.

Wellness technologies are the hot, new item focusing on health and fitness. There are smart yoga mats, portable exercise devices, devices for posture improvement, and more! Check out the new wellness technologies and how they can improve your quality of life.

(BI) Bahasa Indonesia (C) Cantonese (E) English (H) Hindi (J) Japanese (K) Korean (M) Mandarin (S) Spanish (T) Thai

SUNDAY AFTERNOON

	SPEAKER ZONE 1	SPEAKER ZONE 2	SPEAKER ZONE 3
Noon	MEET YOUR MEETING **Leung Wai Ming, CFP, FChFP** 瞭解您的會議（C）	MEET YOUR MEETING **David C. Blake** Meet Your Meeting (E)	MEET YOUR MEETING **Pornprapa Sukreepirom** ส่องดูการประชุมของคุณ (T)
12:05			
12:10			
12:15			
12:20			
12:25			
12:30	**David L. Alarid** The Power of Visual Analogy	**"The 12 Week Year"**	**Minoru Sonobe, TLC** 法人経営者との接し方（J）
12:35			
12:40			
12:45			
12:50	**Intellect SEEC** Driving Productivity that Matters with Lead Closer	**Adelia Chung, CLU, ChFC** **Yu Wing Hong** MDRT Foundation Service Projects	**Sang Suk Yun** 10%의 고객정보를 활용한 100%클로징 비법(K)
12:55			
1 p.m.			
1:05			
1:10	**Leroy Anthony Dallas, EMBA, LUTCF** Intrigue Your Prospects All the Way to the Sale with EQ	**Dorin Roxana Israelian** Sireviendo a Clientes Durante Tiempos de Crisis (S)	**Pellegrini Team Consulting** The 5 Scheduling Mistakes
1:15			
1:20			
1:25			
1:30	**Advantage Media Group** Lead The Field: How to Become the Authority in Your Field	**Joseph M. Thomas** Networking Like a Free Safety	
1:35			
1:40			
1:45			
1:50			
1:55			
2 p.m.	MEET YOUR MEETING **Lucia Dewani Soeradji** Maksimalkan meeting anda! (BI)	MEET YOUR MEETING **Juli McNeely, CFP, CLU** Meet Your Meeting (E)	MEET YOUR MEETING **Hsu Feng-Chaio** 瞭解您的會議（M） 了解您的会议（M）
2:05			
2:10			
2:15			
2:20			
2:25			
2:30	**National Christian Foundation** Insurance Strategies that Leverage Asset Gifts Using Donor Advised Funds	**Watchara Intharachat** จดจ่อต่อเป้าหมายอย่างมีวินัย (T)	**Julio Enrique Pastor** Habitos Que Hacen Los Asesores (S)
2:35			
2:40			
2:45			
2:50	**Allan T. Mendels, CLU, ChFC** 10 Ideas from 40+ MDRT Meetings	**AFG Brokerage** How to Make Top of the Table in 2016	**Joo Won Cha** 15분 RP(종신보험과 연금저축 그리고 실손보험 가입 목적) (K)
2:55			
3 p.m.			
3:05			
3:10	**Morimichi Okamoto** パラダイムシフト（J）	**Aryani Puspasari Razik** Sebuah Warisan (BI)	**Parkland Securities, LLC** Business Succession Planning
3:15			
3:20			
3:25			
3:30	**Anthony Matthews Jones BSc(Hons)** Member Author: The Objection Opportunity	**Alvaro Aldrete Morfin, CLU, FSS** Autor Miembro: Vender Sin Vender (S)	**Stephen J. Pustai** Member Author: Dreams Can Come True
3:35			
3:40			
3:45			
3:50			
3:55			
4 p.m.			
4:05			
4:10			
4:15			
4:20			
4:25			
4:30			
4:35			
4:40			
4:45			
4:50			
4:55			
5 p.m.			

Meet Your Meeting · Court of the Table Connect · Top of the Table Connect · Sponsor/Exhibitor · Dahlia+ · MDRT Branding Toolkit · General

SUNDAY AFTERNOON

	BIG IDEA THEATER	GREAT CONVERSATIONS	TECHNOLOGY CLASSROOM
Noon	MEET YOUR MEETING **Wu Zheng Yu** 瞭解您的會議（M） 了解您的会议（M）		**Dahlia+** Apps for Personal and Professional Development
12:30	**Jiang Bo** **Xu Ping** **Yan Rui** 高峰對談 (M) 高峰对谈 (M)		**Sukanta Singha Roy, CFC, FSS** MDRT.org: Know More to Grow More
1:10	**Seung Hyun Won** **Kyung-Reung Kim** **Yong Woo Jung** **Kyung Woo Lee** 세일즈 프로세스, 나만의 최강 노하우 (K)	**Theodore Rusinoff, CFP** **Roger Seim, MSFS, CLU** MDRT Foundation – Multiplying Your Charitable Works	**Kuan Ta Hung** 善用新科技、創造競爭力 (M) 善用新科技、创造竞争力 (M)
1:30			**Brandon Green, CLU, LUTCF** Basic Technology Applications for Your Busines
2 p.m.	MEET YOUR MEETING **Pablo Martinez Ponce** Conozca Su Reunion (S)	**Mak Ching Wah, MBA, FChFP** 贏在起跑線 (C)	**Byeong Hoon Choi** 고객 관리 그만두기! (K)
2:30	**Nikhil Jitendra Anandpara** **Jayant Yeshwant Mahabole** **Parag Harshavadan Shah** **Ravikumar Krishnamoorthy Kodumudi** **R. S. Singh** पैनल चर्चा (H)	**Steve Hammer, CLU, ChFC** Study Groups	**Dahlia+** Apps for Personal and Professional Development
3:10	**The Covenant Group** Getting You to Top of the Table	**Michelle Hoskin** Productivity	**Lorenzo Gallardo** La Tecnologia (S)
3:30			**MDRT Branding Toolkit**
4 p.m.			
5 p.m.			

(BI) Bahasa Indonesia (C) Cantonese (E) English (H) Hindi (J) Japanese (K) Korean (M) Mandarin (S) Spanish (T) Thai

MONDAY

	SPEAKER ZONE 1	SPEAKER ZONE 2	SPEAKER ZONE 3
11 a.m.			
11:05			
11:10			
11:15			
11:20			
11:25			
11:30			
11:35			
11:40			
11:45			
11:50	**Bernard Lim, CFP, CSFE** Business Coaching (E)	**Chou Chen-Ning** 商务辅导 (M) 商務輔導 (M)	**Lorenzo Gallardo** Coaching de Negocios (S)
11:55			
Noon			
12:05			
12:10			
12:15			
12:20			
12:25	**David Vanderzee, CLU, ChFC** Business Coaching (E)	**Se Hwan Kang** 비즈니스 코칭 (K)	**Leung Wai Ming, CFP, FChFP** 商務輔導 (C)
12:30			
12:35			
12:40			
12:45			
12:50			
12:55			
1 p.m.	**Pornprapa Sukreepirom** การฝึกฝนให้บรรลุเป้าหมายทางธุรกิจ (T)	**Mili Miliana** Bisnis coach untuk membangun bisnis anda dengan pesat (BI)	**Wayne D. Minich, CLU, ChFC** Business Coaching (E)
1:05			
1:10			
1:15			
1:20			
1:25			
1:30			
1:35			
1:40	Check out Technology Bar and the Technology Playground. Visit with Exhibitors 1:30 – 5 p.m. Visit with Exhibitors. CZ open until 5:30 p.m.		
1:45			
1:50			
1:55			
2 p.m.			

TECHNOLOGY BAR

11:30 a.m.	MDRT Annual Meeting App
12 p.m.	Using Google Analytics
12:30 p.m.	Alternatives to PowerPoint: Keep Your Audience Engaged
1 p.m.	CRM & Client Data Management

MONDAY

BIG IDEA THEATER	GREAT CONVERSATIONS	TECHNOLOGY CLASSROOM	
			11 a.m.
			11:05
			11:10
			11:15
			11:20
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			11:30
			11:35
			11:40
			11:45
Juli McNeely, CFP, CLU **H. Larry Fortenberry, CLU, ChFC** **William J. Kanary** **Thomas F. Levasseur, CLU, CLTC** **Gene L. Mahn, CLU, ChFC** **Aleen M. Swofford, CLU, ChFC** Show and Tell: Ideas For Your Business	**Jeffrey M. Wadsworth, MBA, CFP** Case Study: From Tragedy to Triumph… Persistence Pays	**Sukanta Singha Roy, CFC, FSS** MDRT.org and the Resource Zone	11:50
			11:55
			Noon
			12:05
			12:10
			12:15
			12:20
	Li Jihong Case Study: 保險讓重組家庭更簡單 (M) Case Study: 保险让重组家庭更简单 (M)	**Dahlia+** Apps for Personal and Professional Development	12:25
			12:30
Joseph Fang **Fang Chang-Li** **Lin Hsien** **Hsu Feng-Chaio** 實務銷售研討 (M) 实务销售研讨 (M)			12:35
			12:40
			12:45
			12:50
			12:55
	John Maher Case Study: You Never Know What's Around the Corner	**MDRT Branding Toolkit**	1 p.m.
			1:05
			1:10
			1:15
			1:20
			1:25
			1:30
			1:35
Check out Technology Bar and the Technology Playground. Visit with Exhibitors 1:30 – 5 p.m. Visit with Exhibitors. CZ open until 5:30 p.m.			1:40
			1:45
			1:50
			1:55
			2 p.m.

TECHNOLOGY PLAYGROUND

TECHNOLOGY OF THE FUTURE, NOW: AI ON YOUR DEVICES

11:30 a.m. – 12:00 p.m.

Alexa on Amazon Echo, Siri on Apple devices, and Cortana on Windows… More apps powered by AI are becoming available. We'll discuss what's available and how you can start incorporating AI technology into your life.

TECHNOLOGY FORETOLD IN THE FILM *MINORITY REPORT*

12:30 – 1:00 p.m.

Wearables, artificial intelligence and virtual reality are transforming every corner of our lives. They continue to expand, including gesture-based technology, robots, wearables, virtual reality, all foretold in the movie *Minority Report*. Learn how these cool technologies are impacting our lives.

TUESDAY MORNING

	SPEAKER ZONE 1	SPEAKER ZONE 2	SPEAKER ZONE 3
9:30 a.m.			
9:35			
9:40	**eFileCabinet** What Does Today's Paperless Office Look Like?	**ASH Brokerage** Marketing to Centers of Influence–Accountants and Attorneys	**ExamOne** Improving the Applicant Experience
9:45			
9:50			
9:55			
10 a.m.	TOP OF THE TABLE CONNECT **Gregory Pogonowski, Dip PFS, Cert CIIMP** Outsourcing Your Staff (To Increase Your Bottom Line)	TOP OF THE TABLE CONNECT **Barbara A. Pietrangelo, CFP, ChFC** Presentation Multiplication	TOP OF THE TABLE CONNECT **Xin Tong** 運用四個賬戶做好家庭財務規劃 (M) 运用四个账户做好家庭财务规划 (M)
10:05			
10:10			
10:15			
10:20			
10:25	TOP OF THE TABLE CONNECT **Colin R. Parkin, Dip FA, CeMAP** Soft Selling Secrets	TOP OF THE TABLE CONNECT **Boonchai Tohsuwanwanich** สุดยอดไอเดียการขายเงินล้าน (T)	TOP OF THE TABLE CONNECT **Gregory B. Gagne, ChFC** Working with Middle Market Millionaires
10:30			
10:35			
10:40			
10:45			
10:50	TOP OF THE TABLE CONNECT **Frederick T. Scruggs, CLU, ChFC** Legacy Building	TOP OF THE TABLE CONNECT **Wu Shuk Ping** 客源不斷原於不斷客緣 (C)	TOP OF THE TABLE CONNECT **Ashley Ronald Pattinson, ADFP, ChLP** Productivity Secrets
10:55			
11 a.m.			
11:05			
11:10			
11:15	TOP OF THE TABLE CONNECT **Shizuko Ozaki** TOTになるために私がやった5つのこと（J）	TOP OF THE TABLE CONNECT **David C. Blake** Top of the Table via Disability Insurance	TOP OF THE TABLE CONNECT **Jeffrey Wadsworth, MBA, CFP** Top of the Table Insurance Strategies for Business Owners
11:20			
11:25			
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11:35			
11:40	**Heather L. Meszaros, CHS** Value of a Mentor	**Kousuke Ishihara** 個人保険を売り続ける方法　（J）	**Myung Ja Yun** 보험금 숨은 그림 찾기 (K)
11:45			
11:50			
11:55			
Noon			

TECHNOLOGY BAR

10 a.m.	Choosing New Hardware or Devices
10:30 a.m.	Finance & Expense Management
11 a.m.	Learn to Tweet
11:30 a.m.	Software Tools to Improve Your Workflow & Project Management
12 p.m.	Evaluate your Business Automation Systems
12:30 p.m.	Social Media Management Tools
1 p.m.	CRM & Client Data Management
1:30 p.m.	Evaluate your Website
2 p.m.	Choosing New Hardware or Devices
2:30 p.m.	Evaluate your LinkedIn Company Page
3 p.m.	Overview of Social Networks
3:30 p.m.	Evaluate your LinkedIn Profile
4 p.m.	Tools for Sales & Marketing Teams
4:30 p.m.	Tips and Tricks on How to Tame Your Inbox

Meet Your Meeting　Court of the Table Connect　Top of the Table Connect　Sponsor/Exhibitor　Dahlia+　MDRT Branding Toolkit　General

TUESDAY MORNING

	BIG IDEA THEATER	GREAT CONVERSATIONS	TECHNOLOGY CLASSROOM
9:30 a.m.			
9:40			**MDRT Branding Toolkit**
10 a.m.	TOP OF THE TABLE CONNECT **Ryan J. Pinney** Maximizing Client Interactions Using Sales and Marketing Automation	TOP OF THE TABLE CONNECT **Brent J. Welch, CFP, ChFC** Create Authority and Celebrity by Writing a Book	TOP OF THE TABLE CONNECT **Jenny Brown, CFP, FChFP** Social Media
10:25	TOP OF THE TABLE CONNECT **Marc A. Silverman, CFP, ChFC** Marketing Strategies Towards Top of the Table	TOP OF THE TABLE CONNECT **John Nichols, MSM, CLU** Leveraging Stories to Reach Top of the Table	TOP OF THE TABLE CONNECT **Devang Patel, CFP, CLU** EMoney Planning Tool
10:50	TOP OF THE TABLE CONNECT **Simon D. Lister, Dip PFS** Sales Tips to Get You to the Top	TOP OF THE TABLE CONNECT **Edward C. Skelly, CLU, ChFC** How to Get to the Top of The Table	TOP OF THE TABLE CONNECT **Remigiusz Stanislawek** How to Expand Your Practice Using E-Marketing Techniques
11:15	TOP OF THE TABLE CONNECT **James A. Jacobs, CLU, ChFC** Mining the Term Insurance Minefield	TOP OF THE TABLE CONNECT **Jorge Martinez Moyar** Formula De Ventas (S)	TOP OF THE TABLE CONNECT **David M. Ethell, LUTCF** Grow Your Practice Through Service
11:40	**Sanjay Tolani** Objection Handling – The Road Map to Top of the Table Sales	**MDRT Speaks: A Deeper Dive**	**Barbara Rozgonyi** 5 Ways to Invigorate Your LinkedIn Profile in 15 Minutes or Less
Noon			

TECHNOLOGY PLAYGROUND

TECHNOLOGY OF THE FUTURE, NOW: AI ON YOUR DEVICES

10 – 10:30 a.m., 2 – 2:30 p.m.

Alexa on Amazon Echo, Siri on Apple devices, and Cortana on Windows… More apps powered by AI are becoming available. We'll discuss what's available and how you can start incorporating AI technology into your life.

STAYING FIT & ACTIVE WHILE ON THE ROAD WITH APPS + WEARABLES

11 – 11:30 a.m., 4 – 4:30 p.m.

FitBit, Apple Watch, Misfit Shine – there are many devices that can help keep you motivated to reach your fitness goals. Experiment with some of the most common apps and wearable technology that will allow you to stay fit.

TECHNOLOGY FORETOLD IN THE FILM *MINORITY REPORT*

12 – 12:30 p.m., 3 – 3:30 p.m.

Wearables, artificial intelligence and virtual reality are transforming every corner of our lives. They continue to expand, including gesture-based technology, robots, wearables, virtual reality, all foretold in the movie *Minority Report*. Learn how these cool technologies are impacting our lives.

WELLNESS TECHNOLOGIES FOR YOUR BODY, HOME & OFFICE

1 – 1:30 p.m.

Wellness technologies are the hot, new item focusing on health and fitness. There are smart yoga mats, portable exercise devices, devices for posture improvement, and more! Check out the new wellness technologies and how they can improve your quality of life.

TUESDAY AFTERNOON

	SPEAKER ZONE 1	SPEAKER ZONE 2	SPEAKER ZONE 3
Noon	**MetLife** Success and Continuity Planning: By Design or Default?	**Godfrey Phillips, FChFP, JP** Critical Illiness – Line of Credit	**Dennis P. Sunderman** Medicare Essentials
12:20	**Hiroshi Yokouchi** Ｄｒマーケットの展開（J）	**Asset-Map, LLC** See the Future of Financial Conversations	**Richard J. Presky, LUTCF, CLU** Secrets to My Sales Success
12:40	**AIA Group** Sustaining Success	**Ann Baker Ronn, LUTCF** The Goose and the Golden Egg	**Feng Yue** 壽險因團隊而精彩 (M) 寿险因团队而精彩 (M)
1 p.m.	**John S. D. Shorter, Cert PFS, FLIA** Retire Successfully	**Masaaki Yamamoto, TLC** 奇跡の営業（J）	**Bong Jun Kim** 저성장시대 성공전략 (K)
1:20	**Liu Li Sheng** 換一種語言說保險 (M) 换一种语言说保险 (M)	**Kallol Ghosh** ग्राहक प्रतिधारण (H)	**Trust Builders, Inc.** Stand High on the Top of the Table with Cutting-Edge Retirement Tools
1:40	**Lucia Dewani Soeradji** Rahasia mencapai ke level yang lebih tinggi (BI)	**Ohio National Financial Services** Three Simple Sales Ideas	**Lin Hsien** 以「守護他的健康，創造你的財富以 (M) 「守护他的健康，创造你的财富 (M)
2 p.m.	**Transpacific Financial Inc.** How to Deal With the High-Net-Worth Foreign National Market	**Michael J. McNeil, CLU, ChFC** The Baby Boomer Gold Mine	**Haruthai Kraiwapan, M.D., LUTCF** กองทุนเพื่อความสงบทางใจ (T)
2:20	**Audrey Thomas, CSP** Productivity	**Grand Prospects Financial & Insurance Services** PIONEER: New Frontiers to Upgrade Your Market!	**Kuo Fu-Jung** 參與年會學習後的銳變 (M) 参与年会学习后的锐变 (M)
2:40	**Luis Arturo Juarez Morales** Accediendo a Nichos de Mercado VIP (S)	**Corey A. Metz, CLU** Growing Your Business	**Continental Insurance Brokers** Larger Than Life – Premium Financing for High-Value Life Insurance
3 p.m.	**Chan Wai Ying** 成功踏上COT (C)	**Fifth Season Financial** Fifth Season Financial's FLAG Program: A Better Alternative To A Life Settlement	**Adrian P. Baker, Dip PFS** **Elaine Milne, Dip PFS** MDRT Foundation – UK Projects
3:20	**Dong Wook Kim** 생애설계의 이상적 구조 (K)	**Desjardins Insurance** Why Desjardins?	**Carlos Gutierrez Mendoza** Porque tu Cartera de Clientes Puede ser tu Mina de Oro (S)
3:40	**Nittya Makaew** การขยายตลาดลูกค้าชั้นสูง (T)	**Maximizer CRM** The Great Millennium Wealth Transfer	**Hsu Feng-Chaio** 信任的延伸 (M) 信任的延伸 (M)
4 p.m.	**Anita Jamin, M.D., RFP** Penghasilan Super Aktif vs Penghasilan Pasif (BI)	**Hui Wing Wah, MBA, FChFP** 用FNA爭取無盡客戶 (C)	**FMP Mortgage Investments Inc.** Investing in Canadian Real Estate: Syndicate Mortgage Investments
5 p.m.			

Meet Your Meeting | Court of the Table Connect | Top of the Table Connect | Sponsor/Exhibitor | Dahlia+ | MDRT Branding Toolkit | General

TUESDAY AFTERNOON

BIG IDEA THEATER

Continued from 11:40 a.m.
Objection Handling–The Road Map to Top of the Table Sales

MDRT Executive Committee
ExCom Panel Discussion

Thomas Hegna, CLU, ChFC
7 Steps to Retirement Security

Lam Tung Choi
Mok Kin Bik
Tam Hok Hei
高峰對談 (C)

Van Mueller, LUTCF
Annuities in a Low Rate Interest Environment

Laura Perez Leon
Dayra Irene Chavez
Augusto Quijano Farjat
Moises Martinez Hernandez
Panel de Discusión (S)

GREAT CONVERSATIONS

Continued from 11:40 a.m.
MDRT Speaks: A Deeper Dive

MDRT Speaks: A Deeper Dive

MDRT Speaks: A Deeper Dive

MDRT Speaks: A Deeper Dive

MDRT Speaks: A Deeper Dive

MDRT Speaks: A Deeper Dive

MDRT Speaks: A Deeper Dive

TECHNOLOGY CLASSROOM

Continued from 11:40 a.m.
5 Ways to Invigorate Your LinkedIn Profile in 15 Minutes or Less

MDRT Branding Toolkit

MDRT Speaks: A Deeper Dive

Dahlia+
Apps for Personal and Professional Development

Sukanta Singha Roy, CFC, FSS
फेसबुक पर आईये बिज़नेस बर्राईये (H)

Dahlia+
Apps for Personal and Professional Development

Dahlia+
Apps for Personal and Professional Development

MDRT Speaks: A Deeper Dive

Dahlia+
Apps for Personal and Professional Development

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(BI) Bahasa Indonesia (C) Cantonese (E) English (H) Hindi (J) Japanese (K) Korean (M) Mandarin (S) Spanish (T) Thai

MEET YOUR MEETING SESSIONS

SUNDAY

10 – 10:25 A.M.	12 – 12:25 P.M.	2 – 2:25 P.M.
SPEAKER ZONE 1 / Mandarin Pei Hua Tsai 瞭解您的會議 了解您的会议	SPEAKER ZONE 1 / Cantonese Leung Wai Ming, CFP, FChFP 瞭解您的會議	SPEAKER ZONE 1 / (Bahasa Indonesia) Lucia Dewani Soeradji Maksimalkan meeting anda!
SPEAKER ZONE 2 / Japanese Junji Yamaguchi ミーティング・プログラムのご紹介	SPEAKER ZONE 2 / English David C. Blake Meet Your Meeting	SPEAKER ZONE 2 / English Juli McNeely, CFP, CLU Meet Your Meeting
SPEAKER ZONE 3 / Korean Chan Hyun Baek 연차총회 프로그램 백 프로 활용법	SPEAKER ZONE 3 / Thai Pornprapa Sukreepirom ส่องดูการประชุมของคุณ	SPEAKER ZONE 3 / Mandarin Hsu Feng-Chaio 瞭解您的會議 了解您的会议
BIG IDEA THEATER / English Robert Waddell, RICP Meet Your Meeting	BIG IDEA THEATER / Mandarin Wu Zheng Yu 瞭解您的會議 了解您的会议	BIG IDEA THEATER / Spanish Pablo Ponce Martinez Conozca Su Reunion

SESSIONS

The 12 Week Year
Speaker Zone 2, Sunday: 12:30 – 12:45 p.m.
The 12 Week Year (English)

Advantage Media Group
Speaker Zone 1, Sunday: 1:30 – 1:45 p.m.
Lead The Field: How to Become the Authority in Your Field (English)

AFG Brokerage
Speaker Zone 2, Sunday: 2:50 – 3:05 p.m.
How to Make Top of the Table in 2016 (English)

AIA Group
Speaker Zone 1, Tuesday: 12:40 – 12:55 p.m.
Sustaining Success (English)

Alarid, David L.
Total membership years: 28
Total Court of the Table years: 1
Speaker Zone 1, Sunday: 12:30 – 12:45 p.m.
The Power of Visual Analogy (English)

Aldrete Morfin, Alvaro, CLU, FSS
Total membership years: 9
Total Top of the Table years: 2
Total Court of the Table years: 4
Speaker Zone 2, Sunday: 3:30 – 4 p.m.
Autor miembro: Vender Sin Vender (Spanish)

Anandpara, Nikhil Jitendra
Total membership years: 14
Total Top of the Table years: 3
Total Court of the Table years: 9
Speaker Zone 3, Sunday: 10:30 – 10:50 a.m.
Selling to the High-Income Market (English)

Big Idea Theater, Sunday: 2:30 – 3:05 p.m.
पैनल चर्चा (Hindi)

Andrea Bullard & Company
Speaker Zone 3, Sunday: 11:45 a.m. – 12 p.m.
3 Critical Keys to Catapult Your Business from MDRT to Top of the Table (English)

ASH Brokerage
Speaker Zone 2, Tuesday: 9:40 – 9:55 a.m.
Marketing to Centers of Influence – Accountants and Attorneys (English)

Asset-Map, LLC
Speaker Zone 2, Tuesday: 12:20 – 12:35 p.m.
See the Future of Financial Conversations (English)

Baek, Chan Hyun
Total membership years: 13
Total Court of the Table years: 1
Speaker Zone 3, Sunday: 10 – 10:25a.m.
연차총회 프로그램 백 프로 활용법 (Korean)

Bahk, Mi Ah
Total membership years: 9
Total Top of the Table years: 1
Total Court of the Table years: 5
Speaker Zone 1, Sunday: 10:55 – 11:15 a.m.
골든에이지로 가는 길 – 고품격 인생을 위한 은퇴 플랜 (Korean)

Baker, Adrian P., Dip PFS
Total membership years: 34
Total Court of the Table years: 7
Speaker Zone 3, Tuesday: 3 – 3:15 p.m.
MDRT Foundation – UK Projects (English)

Blake, David C.
Total membership years: 16
Total Top of the Table years: 7
Total Court of the Table years: 9
Speaker Zone 2, Sunday: 12 – 12:25 p.m.
Meet Your Meeting (English)

Speaker Zone 2, Tuesday: 11:15 – 11:35 a.m.
Top of the Table via Disability Insurance (English)

Brown, Jenny, CFP, FChFP
Total membership years: 8
Total Top of the Table years: 2
Total Court of the Table years: 4
Technology Zone, Tuesday: 10 – 10:20 a.m.
Social Media (English)

Cha, Joo Won
Total membership years: 7
Total Court of the Table years: 1
Speaker Zone 3, Sunday: 2:50 – 3:05 p.m.
15분 RP (종신보험과 연금저축 그리고 실손보험 가입 목적) (Korean)

Chan Wai Ying (Susanna)
Total membership years: 13
Total Court of the Table years: 5
Speaker Zone 1, Tuesday: 3 – 3:15 p.m.
成功踏上COT (Cantonese)

Chávez, Dayra Irene
Total membership years: 5
Big Idea Theater, Tuesday: 3:50 – 4:35 p.m.
Panel de Discusión (Spanish)

Choi, Byeong Hoon
Total membership years: 7
Technology Zone, Sunday: 2 – 2:15 p.m.
고객 관리 그만두기! (Korean)

Chou Chen-Ning
Total membership years: 6
Total Court of the Table years: 1
Great Conversations, Sunday: 11:20 – 11:40 a.m.
經由FB蒐集有效名單
经由FB搜集有效名单 (Mandarin)

Speaker Zone 3, Monday: 11:50 a.m. – 12:20 p.m.
商务辅导
商務輔導 (Mandarin)

Chung, Adelia, CLU, ChFC
Total membership years: 33
Total Top of the Table years: 11
Total Court of the Table years: 19
Speaker Zone 2, Sunday: 12:50 – 1:05 p.m.
MDRT Foundation Service Projects (English)

Continental Insurance Brokers
Speaker Zone 3, Tuesday: 2:40 – 2:55 p.m.
Larger than Life – Premium Financing for High-Value Life Insurance (English)

The Covenant Group
Big Idea Theater, Sunday: 3:15 – 4 p.m.
Getting You to Top of the Table (English)

Dahlia+
Apps for Personal and Professional Development
Technology Zone:
Sunday: 10:30 – 10:50 a.m., 12:00 – 12:25 p.m., 2:30 – 3:05 p.m.
Monday: 12:25 – 12:55 p.m.
Tuesday: 1:00 – 1:35 p.m., 2:20 – 2:55 p.m., 3:00 – 3:15 p.m., 3:50 – 4:35 p.m.

Dallas, Leroy Anthony, EMBA, LUTCF
Total membership years: 14
Total Top of the Table years: 1
Total Court of the Table years: 4
Speaker Zone 1, Sunday: 1:10 – 1:25 p.m.
Intrigue Your Prospects All the Way to the Sale with EQ (English)

Desjardins Insurance
Speaker Zone 2, Tuesday: 3:20 – 3:35 p.m.
Why Desjardins? (English)

Dewani Soeradji, Lucia
Total membership years: 8
Speaker Zone 1, Sunday: 2 – 2:25 p.m.
Maksimalkan meeting anda! (Bahasa Indonesia)

Speaker Zone 1, Tuesday: 1:40 – 1:55 p.m.
Rahasia mencapai ke level yang lebih tinggi (Bahasa Indonesia)

eFileCabinet
Speaker Zone 1, Tuesday: 9:40 – 9:55 a.m.
What Does Today's Paperless Office Look Like? (English)

Ethell, David M., LUTCF
Total membership years: 15
Total Top of the Table years: 9
Total Court of the Table years: 12
Technology Zone, Tuesday: 11:15 – 11:35 a.m.
Grow Your Practice Through Service (English)

ExamOne
Speaker Zone 3, Tuesday: 9:40 – 9:55 a.m.
Improving the Applicant Experience (English)

Fang Chang-Li
Total membership years: 6
Big Idea Theater, Monday: 12:35 – 1:15 p.m.
實務銷售研討
实务销售研讨 (Mandarin)

Fang, Joseph
Total membership years: 15
Big Idea Theater, Monday: 12:35 – 1:15 p.m.
實務銷售研討
实务销售研讨 (Mandarin)

Feng Yue
Total membership years: 10
Total Court of the Table years: 1
Speaker Zone 3, Tuesday: 12:40 – 12:55 p.m.
壽險因團隊而精彩
寿险因团队而精彩 (Mandarin)

Fifth Season Financial
Speaker Zone 2, Tuesday: 3 – 3:15 p.m.
Fifth Season Financial's FLAG Program:
A Better Alternative To A Life Settlement
(English)

Fortenberry, H. Larry, CLU, ChFC
Total membership years: 40
Total Top of the Table years: 17
Total Court of the Table years: 26
Big Idea Theater, Monday: 11:50 a.m. – 12:30 p.m.
Show and Tell: Ideas For Your Business
(English)

FMP Mortgage Investments Inc.
Speaker Zone 3, Tuesday: 4 – 4:15 p.m.
Investing in Canadian Real Estate:
Syndicate Mortgage Investments

Gagne, Gregory B., ChFC
Total membership years: 17
Total Top of the Table years: 8
Total Court of the Table years: 12
Speaker Zone 3, Tuesday: 10:25 – 10:45 a.m.
Working with Middle Market Millionaires
(English)

Gallardo, Lorenzo
Total membership years: 6
Total Court of the Table years: 1
Technology Zone, Sunday: 3:10 – 3:25 p.m.
La Tecnologia (Spanish)

Speaker Zone 3, Monday: 11:50 a.m. – 12:20 p.m.
Coaching de Negocios (Spanish)

Gawthrop, Robert, CFP, CLU
Total membership years: 24
Total Top of the Table years: 1
Total Court of the Table years: 8
Speaker Zone 1, Sunday: 11:20 – 11:55 a.m.
Member Author: One Page Presentations
(English)

Ghosh, Kallol
Total membership years: 12
Total Court of the Table years: 2
Speaker Zone 2, Tuesday: 1:20 – 1:35 p.m.
ग्राहक प्रतिधारण (Hindi)

Grand Prospects Financial & Insurance Services
Speaker Zone 2, Tuesday: 2:20 – 2:35 p.m.
PIONEER: New Frontiers to Upgrade Your
Market! (English)

Green, Brandon, CLU, LUTCF
Total membership years: 7
Technology Zone, Sunday: 1:30 – 1:45 p.m.
Basic Technology Applications for
Your Business (English)

Griffith, Blake Colin Maurice
Total membership years: 7
Total Court of the Table years: 4
Technology Zone, Sunday: 11:20 – 11:40 a.m.
Reaching Affluent Clients by Partnering with
Accountants and Lawyers (English)

Gutiérrez Mendoza, Carlos
Total membership years: 3
Speaker Zone 3, Tuesday: 3:20 – 3:35 p.m.
Porque tu Cartera de Clientes Puede ser tu
Mina de Oro (Spanish)

Hammer, Steve, CLU, ChFC
Total membership years: 23
Total Top of the Table years: 1
Total Court of the Table years: 5
Great Conversations, Sunday: 2:30 – 3:05 p.m.
Study Groups (English)

Hegna, Thomas, CLU, ChFC
Focus Session Speaker
Big Idea Theater, Tuesday: 1:20 – 2:05 p.m.
7 Steps to Retirement Security (English)

Hill, Peter, ChFC
Total membership years: 20
Total Court of the Table years: 15
Speaker Zone 1, Sunday: 10:30 – 10:50 a.m.
Maximizing Survivor Social Security
(English)

Holt, H. Adam, ChFC
Total membership years: 8
Total Court of the Table years: 6
Technology Zone, Sunday: 10:55 – 11:15 a.m.
Asset Allocation Discussions with Clients
(English)

Hoskin, Michelle
Focus Session Speaker
Great Conversations, Sunday: 3:10 – 3:55 p.m.
Productivity (English)

Hui Wing Wah (Anthony), MBA, FChFP
Total membership years: 19
Speaker Zone 2, Tuesday: 4 – 4:15 p.m.
用FNA爭取無盡客戶 (Cantonese)

Hsu Feng-Chaio (Jennica)
Total membership years: 7
Speaker Zone 3, Sunday: 2 – 2:25 p.m.
瞭解您的會議
了解您的会议 (Mandarin)

Big Idea Theater, Monday: 12:35 – 1:15 p.m.
實務銷售研討
实务销售研讨 (Mandarin)

Speaker Zone 3, Tuesday: 3:40 – 3:55 p.m.
信任的延伸
信任的延伸 (Mandarin)

Intellect SEEC
Speaker Zone 1, Sunday: 12:50 – 1:05 p.m.
Driving Productivity That Matters
with Lead Closer (English)

Intharachat, Watchara
Total membership years: 11
Total Top of the Table years: 2
Total Court of the Table years: 6
Speaker Zone 2, Sunday: 2:30 – 2:45 p.m.
จดจ่อต่อเป้าหมายอย่างมีวินัย (Thai)

Ishihara, Kousuke
Total membership years: 12
Total Court of the Table years: 7
Speaker Zone 2, Tuesday: 11:40 – 11:55 a.m.
個人保険を売り続ける方法 (Japanese)

Israelian, Dorin Roxana
Total membership years: 16
Total Top of the Table years: 1
Total Court of the Table years: 9
Speaker Zone 2, Sunday: 1:10 – 1:25 p.m.
Sirviendo a Clientes Durante
Tiempos de Crisis (Spanish)

Jacobs, James A., CLU, ChFC
Total membership years: 44
Total Top of the Table years: 16
Total Court of the Table years: 30
Big Idea Theater, Tuesday: 11:15 – 11:35 a.m.
Mining the Term Insurance Minefield (English)

Jamin, Anita, M.D., RFP
Total membership years: 2
Speaker Zone 1, Tuesday: 4 – 4:15 p.m.
Penghasilan Super Aktif vs Penghasilan Pasif
(Bahasa Indonesia)

Jiang, Bo (Diana)
Total membership years: 10
Big Idea Theater, Sunday: 12:30 – 1:05 p.m.
高峰對談
高峰对谈 (Mandarin)

Joki, Robert B., CLU, ChFC
Total membership years: 44
Total Court of the Table years: 2
Great Conversations, Sunday: 10:30 – 10:50 a.m.
Study Groups (English)

Jones, Anthony Matthews, BSc(Hons)
Total membership years: 9
Total Top of the Table years: 4
Total Court of the Table years: 8
Speaker Zone 1, Sunday: 3:30 – 4 p.m.
Member Author: The Objection Opportunity
(English)

Juarez Morales, Luiz Arturo
Total membership years: 4
Total Top of the Table years: 1
Total Court of the Table years: 3
Speaker Zone 1, Tuesday: 2:40 – 2:55 p.m.
Accediendo a Nichos de Mercado VIP
(Spanish)

Jung, Yong Woo
Total membership years: 7
Total Court of the Table years: 1
Big Idea Theater, Sunday: 1:10 – 1:45 p.m.
세일즈 프로세스, 나만의 최강 노하우 (Korean)

Kanary, William J.
Total membership years: 38
Total Court of the Table years: 6
Big Idea Theater, Monday: 11:50 a.m. – 12:30 p.m.
Show and Tell: Ideas For Your Business
(English)

Kang, Se Hwan
Total membership years: 13
Speaker Zone 2, Monday: 12:25 – 12:55 p.m.
비즈니스 코칭 (Korean)

Kim, Kyung-Reung
Total membership years: 15
Total Court of the Table years: 3
Big Idea Theater, Sunday: 1:10 – 1:45 p.m.
세일즈 프로세스, 나만의 최강 노하우 (Korean)

Kim, Dong Wook
Total membership years: 10
Total Court of the Table years: 2
Speaker Zone 1, Tuesday: 3:20 – 3:55 p.m.
생애설계의 이상적 구조 (Korean)

Kim, Bong Jun
Total membership years: 9
Speaker Zone 3, Tuesday: 1 – 1:15 p.m.
저성장시대 성공전략 (Korean)

Kodumudi, Ravikumar Krishnamoorthy
Total membership years: 11
Total Court of the Table years: 1
Big Idea Theater, Sunday: 2:30 – 3:05 p.m.
पैनल चर्चा (Hindi)

Kraiwapan, Haruthai, M.D., LUTCF
Total membership years: 12
Total Top of the Table years: 2
Total Court of the Table years: 5
Speaker Zone 3, Tuesday: 2 – 2:15 p.m.
กองทุนเพื่อความสงบทางใจ (Thai)

Kuan Ta Hung (Marcus)
Total membership years: 3
Technology Zone, Sunday: 1:10 – 1:25 p.m.
善用新科技、創造競爭力
善用新科技、创造竞争力 (Mandarin)

Kuo Fu-Jung
Total membership years: 6
Total Court of the Table years: 1
Speaker Zone 3, Tuesday: 2:20 – 2:35 p.m.
參與年會學習後的銳變
参与年会学习后的锐变
(Mandarin)

Lam Tung Choi (Andy)
Total membership years: 5
Big Idea Theater, Tuesday: 2:10 – 2:55 p.m.
高峰對談 (Cantonese)

Lee, Kyung Woo
Total membership years: 8
Big Idea Theater, Sunday: 1:10 – 1:45 p.m.
세일즈 프로세스, 나만의 최강 노하우 (Korean)

Leung Wai Ming, CFP, FChFP (Patric)
Total membership years: 18
Speaker Zone 1, Sunday: 12 – 12:25 p.m.
瞭解您的會議 (Cantonese)

Speaker Zone 3, Monday: 12:30 – 1 p.m.
商務輔導 (Cantonese)

Levasseur, Thomas F., CLU, CLTC
Total membership years: 27
Total Top of the Table years: 5
Total Court of the Table years: 13
Big Idea Theater, Monday: 11:50 a.m. – 12:30 p.m.
Show and Tell: Ideas For Your Business (English)

Li Jihong
Total membership years: 7
Total Top of the Table years: 1
Total Court of the Table years: 3
Great Conversations, Monday: 12:25 – 12:55 p.m.
Case Study: 保險讓重組家庭更簡單
Case Study: 保险让重组家庭更简单 (Mandarin)

Lim, Bernard, CFP, CSFE
Focus Session Speaker
Speaker Zone 1, Monday: 11:50 a.m. – 12:20 p.m.
Business Coaching (English)

Lin Hsien
Total membership years: 9
Total Court of the Table years: 4
Big Idea Theater, Monday: 12:35 – 1:15 p.m.
實務銷售研討
实务销售研讨 (Mandarin)

Speaker Zone 3, Tuesday: 1:40 – 1:55 p.m.
以「守護他的健康，創造你的財富以
守护他的健康，创造你的财富 (Mandarin)

Lister, Simon D., Dip PFS
Total membership years: 9
Total Top of the Table years: 6
Total Court of the Table years: 9
Big Idea Theater, Tuesday: 10:50 – 11:10 a.m.
Sales Tips to Get You to the Top (English)

Liu Li Sheng
Total membership years: 9
Speaker Zone 1, Tuesday: 1:20 – 1:35 p.m.
換一種語言說保險
换一种语言说保险 (Mandarin)

Mahabole, Jayant Yeshwant
Total membership years: 9
Total Top of the Table years: 1
Total Court of the Table years: 5
Speaker Zone 3, Sunday: 11:20 – 11:40 a.m.
रश्ते बनाते जाओ बीमा होता जाएगा (Hindi)

Big Idea Theater, Sunday: 2:30 – 3:05 p.m.
पैनल चर्चा (Hindi)

Maher, John
Focus Session Speaker
Great Conversations, Monday: 1 – 1:30 p.m.
Case Study: You Never Know What's
Around the Corner (English)

Mahn, Gene L., CLU, ChFC
Total membership years: 47
Great Conversations,
Sunday: 11:45 a.m. – 12:25 p.m.
FFREEDM (English)

Big Idea Theater, Monday: 11:50 – 12:30 p.m.
Show and Tell: Ideas For Your Business
(English)

Mak Ching Wah (Selina), MBA, FChFP
Total membership years: 8
Great Conversations, Sunday: 2 – 2:25 p.m.
贏在起跑線 (Cantonese)

Makaew, Nittaya
Total membership years: 1
Total Top of the Table years: 1
Total Court of the Table years: 1
Speaker Zone 1, Tuesday: 3:40 – 3:55 p.m.
การขยายตลาดลูกค้าชั้นสูง (Thai)

Martínez Hernandez, Moisés
Total membership years: 13
Big Idea Theater, Tuesday: 3:50 – 4:35 p.m.
Panel de Discusión (Spanish)

Martínez Moyar, Jorge
Total membership years: 14
Total Top of the Table years: 3
Total Court of the Table years: 9
Great Conversations, Tuesday: 11:15 – 11:35 a.m.
Formula De Ventas (Spanish)

Masuda, Naoki
Total membership years: 6
Technology Zone, Sunday: 11:45 a.m. – 12 p.m.
テクノロジーがもたらす保険営業の未来 (Japanese)

Maximizer CRM
Speaker Zone 2, Tuesday: 3:40 – 3:55 p.m.
The Great Millennium Wealth Transfer
(English)

McDaniels, Charles E., CLU, ChFC
Total membership years: 26
Total Court of the Table years: 4
Great Conversations, Sunday: 10:55 – 11:15 a.m.
Succession Planning (English)

McNeely, Juli, CFP, CLU
Total membership years: 9
Total Court of the Table years: 1
Speaker Zone 2, Sunday: 2 - 2:25 p.m.
Meet Your Meeting (English)

Big Idea Theater, Monday: 11:50 a.m. – 12:30 p.m.
Show and Tell: Ideas For Your Business
(English)

McNeil, Michael J., CLU, ChFC
Total membership years: 38
Total Top of the Table years: 2
Total Court of the Table years: 11
Speaker Zone 2, Tuesday: 2 – 2:15 p.m.
The Baby Boomer Gold Mine (English)

MDRT Branding Toolkit
Learn about tools on mdrt.org that will help you promote your MDRT membership to clients and prospects.
Technology Zone:
Sunday: 10 – 10:25 a.m., 3:30 – 4 p.m.
Monday: 1 – 1:30 p.m.
Tuesday: 9:40 – 9:55 a.m., 12:20 – 12:35 p.m.

MDRT Executive Committee
Big Idea Theater, Tuesday: 12:30 – 1:15 p.m.
ExCom Panel Discussion (English)

Mejia, Claudio Miguel
Total membership years: 15
Total Top of the Table years: 1
Total Court of the Table years: 8
Speaker Zone 3, Sunday: 10:55 – 11:15 a.m.
La Regla del 20/80 para un Retiro
Financieramente Feliz (Spanish)

Mendels, Allan T., CLU, ChFC
Total membership years: 44
Total Top of the Table years: 2
Total Court of the Table years: 15
Speaker Zone 1, Sunday: 2:50 – 3:05 p.m.
10 Ideas from 40+ MDRT Meetings (English)

Meszaros, Heather L., CHS
Total membership years: 3
Speaker Zone 1, Tuesday: 11:40 – 11:55 a.m.
Value of a Mentor (English)

MetLife
Speaker Zone 1, Tuesday: 12 – 12:15 p.m.
Success and Continuity Planning:
By Design or Default? (English)

Metz, Corey A., CLU
Total membership years: 17
Total Top of the Table years: 3
Total Court of the Table years: 9
Speaker Zone 2, Tuesday: 2:40 – 2:55 p.m.
Growing Your Business (English)

Miliana, Mili
Total membership years: 7
Speaker Zone 2, Monday: 1 – 1:30 p.m.
Bisnis coach untuk membangun bisnis anda dengan pesat (Bahasa Indonesia)

Milne, Elaine, Dip PFS
Total membership years: 8
Total Court of the Table years: 3
Speaker Zone 3, Tuesday: 3 – 3:15 p.m.
MDRT Foundation –UK Projects (English)

Minich, Wayne D., CLU, ChFC
Total membership years: 41
Total Top of the Table years: 6
Total Court of the Table years: 21
Speaker Zone 3, Monday: 1 – 1:30 p.m.
Business Coaching (English)

Mok Kin Bik (Diana)
Total membership years: 14
Total Court of the Table years: 1
Big Idea Theater
Tuesday: 2:10 – 2:55 p.m.
高峰對談 (Cantonese)

Mueller, Van, LUTCF
Total membership years: 28
Total Top of the Table years: 25
Total Court of the Table years: 24
Big Idea Theater, Tuesday: 3 – 3:45 p.m.
Annuities in a Low-Rate Interest Environment (English)

Myers, Brad J.
Total membership years: 14
Total Top of the Table years: 1
Total Court of the Table years: 6
Speaker Zone 2, Sunday: 10:55 – 11:15 a.m.
Benefits of Hiring a Business Coach (English)

National Christian Foundation
Speaker Zone 1, Sunday: 2:30 – 2:45 p.m.
Insurance Strategies that Leverage Asset Gifts Using Donor Advised Funds (English)

Nichols, John, MSM, CLU
Total membership years: 16
Total Top of the Table years: 9
Total Court of the Table years: 11
Great Conversations, Tuesday: 10:25 – 10:45 a.m.
Leveraging Stories to Reach Top of the Table (English)

Ohio National Financial Services
Speaker Zone 2, Tuesday: 1:40 – 1:55 p.m.
Three Simple Sales Ideas (English)

Okamoto, Morimichi
Total membership years: 5
Speaker Zone 1, Sunday: 3:10 – 3:25 p.m.
パラダイムシフト (Japanese)

Ozaki, Shizuko
Total membership years: 14
Total Top of the Table years: 1
Total Court of the Table years: 3
Speaker Zone 1, Tuesday: 11:15 – 11:35 a.m.
TOTになるために私がやった5つのこと (Japanese)

Parkin, Colin R., Dip FA, CeMap
Total membership years: 38
Total Top of the Table years: 11
Total Court of the Table years: 18
Speaker Zone 1, Tuesday: 10:25 – 10:45 a.m.
Soft Selling Secrets (English)

Parkland Securities, LLC
Speaker Zone 3, Sunday: 3:10 – 3:25 p.m.
Business Succession Planning (English)

Pastor, Julio Enrique
Total membership years: 10
Speaker Zone 3, Sunday: 2:30 – 2:45p.m.
Habitos Que Hacen Los Asesores (Spanish)

Patel, Devang, CFP, CLU
Total membership years: 13
Total Top of the Table years: 5
Total Court of the Table years: 9
Technology Zone, Tuesday: 10:25 – 10:45 a.m.
EMoney Planning Tool (English)

Pattinson, Ashley Ronald, AFPC, FChFP
Total membership years: 4
Total Top of the Table years: 3
Total Court of the Table years: 4
Speaker Zone 3, Tuesday: 10:50 – 11:10 a.m.
Productivity Secrets (English)

Pellegrini Team Consulting
Speaker Zone 3, Sunday: 1:10 – 1:25 p.m.
The 5 Scheduling Mistakes (English)

Pérez Leon, Laura
Total membership years: 15
Total Top of the Table years: 1
Total Court of the Table years: 8
Big Idea Theater, Tuesday: 3:50 – 4:35 p.m.
Panel de Discusión (Spanish)

Phillips, Godfrey, FChFP, J.P.
Total membership years: 32
Total Court of the Table years: 5
Speaker Zone 2, Tuesday: 12 – 12:15 p.m.
Critical Illness-Line of Credit (English)

Pickett, George B., J.D., CLU
Total membership years: 46
Total Top of the Table years: 3
Total Court of the Table years: 15
Big Idea Theater, Sunday: 10:30 – 10:50 a.m.
Words That Work (English)

Pietrangelo, Barbara A., CFP, ChFC
Total membership years: 18
Total Top of the Table years: 4
Total Court of the Table years: 12
Speaker Zone 2, Tuesday: 10 – 10:20 a.m.
Presentation Multiplication (English)

Pinney, Ryan J.
Total membership years: 8
Total Top of the Table years: 8
Total Court of the Table years: 8
Big Idea Theater, Tuesday: 10 – 10:20 a.m.
Maximizing Client Interactions Using Sales & Marketing Automation (English)

Pogonowski, Gregory, Dip PFS, Cert CIIMP
Total membership years: 23
Total Top of the Table years: 10
Total Court of the Table years: 22
Speaker Zone 1, Tuesday: 10 – 10:20 a.m.
Outsourcing Your Staff
(To Increase Your Bottom Line) (English)

Ponce Martinez, Pablo
Total membership years: 11
Total Top of the Table years: 1
Total Court of the Table years: 7
Big Idea Theater, Sunday: 2 – 2:25 p.m.
Conozca su Reunion (Spanish)

Poontavee, Chuanphit
Total membership years: 17
Total Top of the Table years: 3
Total Court of the Table years: 9
Big Idea Theater, Sunday: 10:55 – 11:15 a.m.
เปลี่ยนชีวิตด้วย MDRT ตลอดชีพ (Thai)

Presky, Richard J., LUTCF, CLU
Total membership years: 31
Total Court of the Table years: 16
Speaker Zone 3, Tuesday: 12:20 – 12:35 p.m.
Secrets to My Sales Success (English)

Pustai, Stephen J.
Total membership years: 37
Total Court of the Table years: 1
Speaker Zone 3, Sunday: 3:30 – 4 p.m.
Member Author: Dreams Can Come True (English)

Quigley, Sean Anthony, LUTCF
Total membership years: 9
Total Court of the Table years: 1
Speaker Zone 2, Sunday: 11:20 – 11:55 a.m.
Member Author: The Cash Play – Capitalizing on the Opportunity Value of Cash (English)

Quijano Farjat, Augusto
Total membership years: 14
Total Court of the Table years: 3
Big Idea Theater, Tuesday: 3:50 – 4:35 p.m.
Panel de Discusión (Spanish)

Razik, Aryani Puspasari
Total membership years: 9
Total Court of the Table years: 2
Speaker Zone 2. Sunday: 3:10 – 3:25 p.m.
Sebuah Warisan (Bahasa Indonesia)

Ronn, Ann Baker, LUTCF
Total membership years: 18
Total Court of the Table years: 3
Speaker Zone 2, Tuesday: 12:40 –12:55 p.m.
The Goose and the Golden Egg (English)

Ross, Michael S.
Total membership years: 11
Total Court of the Table years: 2
Speaker Zone 2, Sunday: 10:30 – 10:50 a.m.
70% of Widows Leave Their Advisors, Don't Be A Statistic (English)

Rozgonyi, Barbara
Focus Session Speaker
Technology Zone, Tuesday: 11:40 a.m. – 12:15 p.m.
5 Ways to Invigorate Your LinkedIn Profile in 15 Minutes or Less (English)

Rusinoff, Theodore S., CFP
Total membership years: 9
Total Top of the Table years: 5
Total Court of the Table years: 6
Great Conversations, Sunday: 1:10 – 1:55 p.m.
MDRT Foundation – Multiplying Your Charitable Works (English)

Scruggs, Frederick T., CLU, ChFC
Total membership years: 37
Total Top of the Table years: 8
Total Court of the Table years: 14
Speaker Zone 1, Tuesday: 10:50 – 11:10 a.m.
Legacy Building (English)

Seim, Roger A., MSFS, CLU
Total membership years: 35
Total Court of the Table years: 1
Great Conversations, Sunday: 1:10 – 1:55 p.m.
MDRT Foundation – Multiplying Your Charitable Works (English)

Shah, Parag Harshavadan
Total membership years: 12
Total Top of the Table years: 1
Total Court of the Table years: 5
Big Idea Theater, Sunday: 2:30 – 3:05 p.m.
पैनल चर्चा (Hindi)

Shorter, John S.D., Cert PFS, FLIA
Total membership years: 29
Speaker Zone 1, Tuesday: 1 – 1:15 p.m.
Retire Successfully (English)

Silverman, Marc A., CFP, ChFC
Total membership years: 32
Total Top of the Table years: 22
Total Court of the Table years: 27
Big Idea Theater, Tuesday: 10:25 – 10:45 a.m.
Marketing Strategies Towards Top of the Table (English)

Singh, R. S.
Total membership years: 9
Total Top of the Table years: 1
Total Court of the Table years: 7
Big Idea Theater, Sunday: 2:30 – 3:05 p.m.
पैनल चर्चा (Hindi)

Singha Roy, Sukanta, CFC, FSS
Total membership years: 3
Technology Zone, Sunday: 12:30 – 1 p.m.
MDRT.org: Know More to Grow More (English)

Technology Zone, Monday: 11:50 a.m. – 12:20 p.m.
MDRT.org and the Resource Zone (English)

Technology Zone, Tuesday: 1:40 – 2:15 p.m.
फेसबुक पर आईये बज़िनेस बर्राईये (Hindi)

Skelly, Edward C., CLU, ChFC
Total membership years: 23
Total Top of the Table years: 6
Total Court of the Table years: 15
Great Conversations, Tuesday: 10:50 – 11:10 a.m.
How to Get to the Top of the Table (English)

Sonobe, Minoru, TLC
Total membership years: 11
Speaker Zone 3, Sunday: 12:30 – 12:45p.m.
法人経営者との接し方（Japanese)

Staebell, Ronald T., CLU, MSFS
Total membership years: 33
Total Top of the Table years: 1
Total Court of the Table years: 2
Great Conversations, Sunday: 10:30 – 10:50 a.m.
Study Groups (English)

Stanislawek, Remigiusz
Total membership years: 4
Total Top of the Table years: 3
Total Court of the Table years: 4
Technology Zone, Tuesday: 10:50 – 11:10 a.m.
How to Expand Your Practice Using
E-Marketing Techniques (English)

Sukreepirom, Pornprapa
Total membership years: 8
Total Court of the Table years: 2
Speaker Zone 3, Sunday: 12 – 12:25 p.m.
ส่องดูการประชุมของคุณ (Thai)

Speaker Zone 1, Monday: 1 p.m. – 1:30 p.m.
การฝึกฝนให้บรรลุเป้าหมายทางธุรกิจ (Thai)

Sunderman, Dennis P.
Total membership years: 18
Total Top of the Table years: 5
Total Court of the Table years: 7
Speaker Zone 3, Tuesday: 12 – 12:15 p.m.
Medicare Essentials (English)

Swofford, Aleen M., CLU, ChFC
Total membership years: 28
Total Top of the Table years: 7
Total Court of the Table years: 14
Big Idea Theater, Monday: 11:50 a.m. – 12:30 p.m.
Show and Tell: Ideas For Your Business
(English)

Tam Hok Hei (Benjamin)
Total membership years: 3
Big Idea Theater, Tuesday: 2:10 – 2:55 p.m.
高峰對談 (Cantonese)

Tauchi, Hiroharu
Total membership years: 12
Total Top of the Table years: 3
Total Court of the Table years: 3
Big Idea Theater, Sunday: 11:20 – 11:40 a.m.
期待値をコントロールする（Japanese)

Thomas, Joseph M.
Total membership years: 3
Speaker Zone 2, Sunday: 1:30 – 1:45 p.m.
Networking Like a Free Safety (English)

Thomas, Audrey, CSP
Focus Session Speaker
Speaker Zone 1, Tuesday: 2:20 – 2:35 p.m.
Productivity

Tohsuwanwanich, Boonchai
Total membership years: 22
Total Top of the Table years: 2
Total Court of the Table years: 8
Speaker Zone 2, Tuesday: 10:25 – 10:45 a.m.
สุดยอดไอเดียการขายเงินล้าน (Thai)

Tolani, Sanjay
Total membership years: 14
Total Top of the Table years: 10
Total Court of the Table years: 12
Big Idea Theater, Tuesday: 11:40 a.m. – 12:25 p.m.
Objection Handling – The Road Map to
Top of the Table Sales (English)

Transpacific Financial, Inc.
Speaker Zone 1, Tuesday: 2 – 2:15 p.m.
How to Deal with the High-Net-Worth Foreign
National Market (English)

Trust Builders, Inc.
Speaker Zone 3, Tuesday: 1:20 – 1:35 p.m.
Stand High on the Top of the Table with the
Cutting-Edge Retirement Tool (English)

Tsai Pei Hua (Peggy)
Total membership years: 15
Total Top of the Table years: 1
Total Court of the Table years: 8
Speaker Zone 1, Sunday: 10 – 10:25 a.m.
瞭解您的會議
了解您的会议 (Mandarin)

Vanderzee, David, CLU, ChFC
Total membership years: 33
Total Top of the Table years: 14
Total Court of the Table years: 24
Speaker Zone 1, Monday: 12:25 – 12:55 p.m.
Business Coaching (English)

Waddell, Robert, RICP
Total membership years: 24
Total Top of the Table years: 1
Total Court of the Table years: 3
Big Idea Theater, Sunday: 10 – 10:25 a.m.
Meet Your Meeting (English)

Wadsworth, Jeffrey M., MBA, CFP
Total membership years: 18
Total Top of the Table years: 6
Total Court of the Table years: 12
Great Conversations, Monday: 11:50 – 12:20 p.m.
Case Study: From Tragedy to Triumph...
Persistence Pays (English)

Speaker Zone 3, Tuesday: 11:15 – 11:35 a.m.
Top of the Table Insurance Strategies for
Business Owners (English)

Welch, Brent J., CFP, ChFC
Total membership years: 24
Total Top of the Table years: 15
Total Court of the Table years: 19
Great Conversations, Tuesday: 10 – 10:20 a.m.
Create Authority and Celebrity By
Writing a Book (English)

Won, Seung Hyun
Total membership years: 14
Big Idea Theater, Sunday: 1:10 – 1:45 p.m.
세일즈 프로세스, 나만의 최강 노하우 (Korean)

Wu Zheng Yu (Nick)
Total membership years: 8
Big Idea Theater, Sunday: 12 – 12:25 p.m.
瞭解您的會議
了解您的会议 (Mandarin)

Wu Shuk Ping (Joyce)
Total membership years: 8
Total Top of the Table years: 1
Total Court of the Table years: 2
Speaker Zone 2, Tuesday: 10:50 – 11:10 a.m.
客源不斷原於不斷客緣 (Cantonese)

Xin Tong
Total membership years: 14
Total Top of the Table years: 3
Total Court of the Table years: 3
Speaker Zone 3, Tuesday: 10 – 10:20 a.m.
運用四個賬戶做好家庭財務規劃
运用四个账户做好家庭财务规划 (Mandarin)

Xu Ping
Total membership years: 2
Total Court of the Table years: 1
Big Idea Theater, Sunday: 12:30 – 1:05 p.m.
高峰對談
高峰对谈 (Mandarin)

Yamaguchi, Junji
Total membership years: 14
Speaker Zone 2, Sunday: 10 – 10:25 a.m.
ミーティング・プログラムのご紹介 (Japanese)

Yamamoto, Masaaki, TLC
Total membership years: 12
Total Court of the Table years: 1
Speaker Zone 2, Tuesday: 1 – 1:15 p.m.
奇跡の営業 (Japanese)

Yan Rui
Total membership years: 2
Total Court of the Table years: 1
Big Idea Theater, Sunday: 12:30 – 1:05 p.m.
高峰對談
高峰对谈 (Mandarin)

Yokouchi, Hiroshi
Total membership years: 11
Total Court of the Table years: 1
Speaker Zone 1, Tuesday: 12:20 – 12:35 p.m.
Ｄｒマーケットの展開 (Japanese)

Yu Wing Hong (Adrian)
Total membership years: 15
Total Court of the Table years: 1
Speaker Zone 2, Sunday: 12:50 – 1:05 p.m.
MDRT Foundation Service Projects (English)

Yun, Sang Suk
Total membership years: 7
Total Court of the Table years: 1
Speaker Zone 3, Sunday: 12:50 – 1:05 p.m.
10%의 고객정보를 활용한 100%클로징 비법 (Korean)

Yun, Myung Ja
Total membership years: 9
Speaker Zone 3, Tuesday: 11:40 – 11:55 a.m.
보험금 숨은 그림 찾기 (Korean)

GENERAL INFORMATION

PRIMARY ANNUAL MEETING VENUE

Vancouver Convention Centre
(East & West Buildings)
1055 Canada Place
Vancouver, British Columbia, V6C 0C3

OFFICIAL ACCOMMODATIONS

1 **The Fairmont Waterfront**
(Co-headquarter hotel)
900 Canada Way
Vancouver, British Columbia, V6C 3L5
Phone: +1 604.691.1991

2 **Pan Pacific Vancouver**
(Co-headquarter hotel)
300-999 Canada Place
Vancouver, British Columbia, V6C 3B5
Phone: +1 604.662.8111

3 **The Fairmont Hotel Vancouver**
900 West Georgia Street
Vancouver, British Columbia, V6C 2W6
Phone: +1 604.684.3131

4 **Four Seasons Hotel Vancouver**
791 West Georgia Street
Vancouver, British Columbia, V6C 2T4
Phone: +1 604.689.9333

5 **Hyatt Regency Vancouver**
655 Burrard Street
Vancouver, British Columbia, V6C 2R7
Phone: +1 604.683.1234

6 **Pinnacle Hotel Vancouver Harbourfront**
1133 West Hastings Street
Vancouver, British Columbia, V6E 3T3
Phone: +1 604.689.9211

7 **Rosewood Hotel Georgia**
801 West Georgia Street
Vancouver, British Columbia, V6C 1P7
Phone: +1 604.682.5566

8 **The Sutton Place Hotel**
845 Burrard Street
Vancouver, British Columbia, V6Z 2K6
Phone: +1 604.682.5511

9 **Vancouver Marriott Downtown**
1128 West Hastings Street
Vancouver, British Columbia, V6E 4R5
Phone: +1 604.684.1128

ADMISSION: NAME BADGES AND TICKETS

Name Badge: Your personal meeting name badge is required for entrance into all sessions and events, including Main Platform, Focus Sessions, Cornerstone Presentations, MDRT Speaks, ConneXion Zone®, Party on the Platform and ticketed events. First-time meeting attendees can be identified by their green badge. Please extend a warm welcome and helping hand to them. Overflow seating is in Convention Center: West – English Bay Ballroom A.

Tickets: Tickets are required to attend events/sessions such as the Court of the Table, Top of the Table Program, Breakfast and Lunch Sessions. Members who registered in advance will find these tickets included with their registration information. Lost tickets will not be replaced, and you will not be admitted into sessions without them. Tickets are not available for sale on-site. Focus Sessions are not ticketed, but plan to arrive early, as seating is on a first-come, first-served basis.

VANCOUVER INFORMATION AND RESTAURANT RESERVATIONS

There are two information booths in the Convention Centre. One is located in the West Building and the other in the East Building. At each booth, personnel can answer questions regarding the city, tours, restaurants, shopping, etc.

ASSISTED-LISTENING DEVICES

Headsets for hearing-impaired attendees are available to members who requested the service during advance registration. Please refer to the simultaneous interpretation requirements located on page 113 for further details.

CONTINUING EDUCATION

Continuing education credits are not offered at the 2016 MDRT Annual Meeting.

BADGES

There will be a USD 995 fee for each replacement badge issued. Treat your badge as you would your passport. It is a valuable document that represents your registration investment. For lost or misplaced badges, go to the On-Site Registration Counter, located in the Convention Centre: East – Exhibit Hall B.

ELECTRONICS

Audio recordings, video recordings and photography are prohibited in ALL sessions, including Main Platform. To avoid any disturbances to the speakers and other attendees, please ensure all sound-emitting electronic devices are either turned off or set to silent mode during the sessions. It is considered impolite to answer your phone during sessions. Thank you for observing this courtesy.

FIRST AID/EMERGENCY ASSISTANCE

Should you need medical assistance of any kind, please contact MDRT staff, Convention Centre staff or hotel staff. At the Convention Centre, there is a First Aid office in the West Building, Level 1 in the lobby near English Bay Ballroom A.

FIRST-TIME ATTENDEE BOOTH

If this is your first MDRT Annual Meeting, WELCOME! Be sure to visit the First-Time Attendee booth, located in the Convention Centre: East – Exhibit Hall B. You will learn firsthand from fellow members how to get the most out of your meeting experience, including events not to be missed. The booth is open on Saturday, 11 a.m. – 4 p.m., and Sunday, 8 a.m. – 4:30 p.m.

GROUP PHOTO SERVICE

If you wish to have a group photograph taken, request forms are available in the MDRT Press Room, located in Room 107 at the Convention Centre. A form may also be obtained from one of the official Annual Meeting photographers. The form should be completed and returned as outlined. Special arrangements for photos must be made between you and the photographer. MDRT encourages attending members to use group photos for local publicity. The group photo platform is located in the Convention Centre: West – English Bay Ballroom Lobby.

HANDOUTS

In an effort to remain environmentally responsible, MDRT handouts are accessible online only. Electronic handouts are available at **mdrt.org/2016am.**

HOUSING ACCOMMODATIONS

Please refer all questions related to housing reservations and accommodations to the Experient Housing Booth located within On-Site Registration in the Convention Centre: East – Exhibit Hall B.

Housing Booth hours are:

SATURDAY, JUNE 11	11 a.m. – 6 p.m.
SUNDAY, JUNE 12	7 a.m. – 7 p.m.
MONDAY, JUNE 13	7 a.m. – 4 p.m.
TUESDAY, JUNE 14	7 a.m. – 4 p.m.
WEDNESDAY, JUNE 15	7 a.m. – 2 p.m.

NOTE: Outside organizations often sponsor their own events concurrently with the MDRT Annual Meeting. MDRT does not sponsor these events. Only the events listed in the program book are sponsored by MDRT. MDRT claims no responsibility for the other events.

IMPORTANT TAX AND LEGAL INFORMATION

Some presentations contain references to tax and legal matters. Although efforts have been made to ensure the accuracy of those references, MDRT does not warrant accuracy and is not liable for errors and omissions. You are strongly urged to check with tax and legal professionals in your state, province or country. MDRT also suggests you consult local insurance and securities regulations and your company's compliance department pertaining to the use of any new sales materials with your clients.

INSTANT RECORDINGS

Instant audio CD, MP3 and DVD recordings of most Main Platform sessions will be available for purchase in the MDRT Store. Audio CDs of the meeting's Focus and Special Sessions will also be available for purchase for those members who want immediate access to these recordings.

JOIN THE MDRT TWEET TEAM

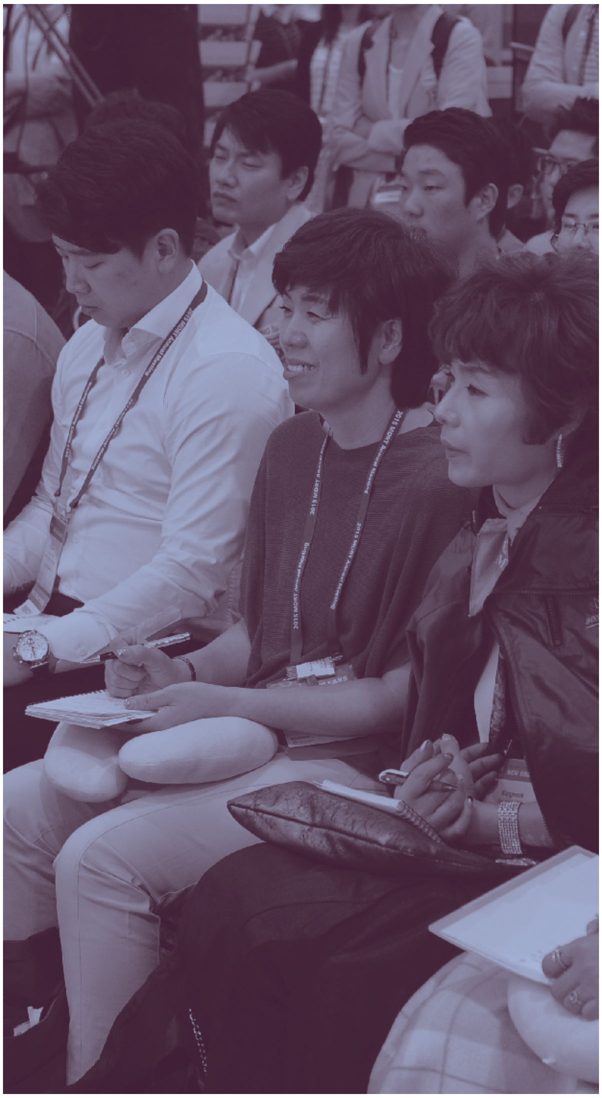
#MDRT2016

MDRT IS TWEETING LIVE, AND WE WANT YOU TO JOIN US. BE SURE TO FOLLOW MDRT AT @MDRTWEET AND USE #MDRT2016 WHEN YOU TWEET ABOUT THE ANNUAL MEETING.

If you don't have a Twitter account and need help setting one up, look for members wearing the "MDRT Tweet Team" ribbon. They will be happy to assist you and show you how to search, start and follow conversations.

With Twitter, you can:

- Connect with speakers and ask questions.
- Look for restaurant advice.
- Find out about tweet-ups and other special events.
- Meet members who have the same interests as you.
- Post pictures taken with your smartphone.
- Search #MDRT2016 to see what people are saying and to find out about special events and giveaways.



LOST AND FOUND

Lost and Found is located at the On-Site Registration Counter in the Convention Centre: East – Exhibit Hall B.

LUNCH OPTIONS

Enjoy a relaxing lunch and take in the beauty of Vancouver at one of the 40 casual and fast food options located within two blocks of the Convention Centre. In addition to offerings in the MDRT ConneXion Zone®, a few small food outlets and nine restaurants are located under the roof of the Convention Centre. The food court in the Fairmont Centre connected to the Fairmont Waterfront Hotel offers as many as 14 options, and nearby hotels feature their own specialty restaurants.

MANUSCRIPTS

Manuscripts of the Focus Sessions are great reference materials and are available for purchase as an Adobe Acrobat PDF file in the MDRT Store. You can choose a CD-ROM format, which contains multiple manuscripts categorized by topic, or you can visit **mdrtstore.org** to purchase individual manuscripts. Manuscripts will not be translated. (*Note: Printed copies of manuscripts are not available for sale.*)

MDRT FOUNDATION BOOTH

The MDRT Foundation is the charitable organization of MDRT. Members can apply for MDRT Foundation grant funding for a charity they are passionate about. The global grant programs are funded by generous donations from members and industry partners.

Each year, the MDRT Foundation partners with a charitable organization that serves children and adults in need. This year, the Foundation is supporting Mercy Ships, a hospital ship that provides life-changing surgeries to people who do not have access to medical care.

For your convenience, there is a personalized donor card in your registration packet. Just check the gift amount box to make your donation, then stop by the MDRT Foundation Booth located in the Convention Centre: West – English Bay Ballroom Lobby, and join your fellow MDRT members to give back globally.

mdrtfoundation.org

MDRT MENTORING PROGRAM

Involvement in a mentoring program provides an opportunity for career exploration and leadership. As a mentor, you'll not only help a professional new to the industry, but also build upon your existing skills as a producer and achieve new success.

Benefits:

MDRT RESEARCH SHOWS MEMBERS WHO PARTICIPATE IN MENTORING EXPERIENCE:

- AN INCREASE IN PRODUCTION DURING THE PROGRAM
- RECOGNITION AT THE MDRT ANNUAL MEETING
- RENEWED ENTHUSIASM FOR THEIR BUSINESS
- EXPOSURE TO NEW PROSPECTS AND NEW MARKETS
- THE OPPORTUNITY TO FIND A JUNIOR PARTNER OR SUCCESSOR

For more information, contact MDRT at +1 (847) 692-6378 or mentoring@mdrt.org.

MDRT STORE

The MDRT Store, located in the Convention Centre: West Building – Exhibit Hall A, has the best educational resources in the industry. These resources — most created by MDRT members — are vital stepping stones in your career. Everything in the MDRT Store can be used to sustain your position as a member of the most elite financial services organization in the world. Our inventory includes products on prospecting, sales ideas, overcoming objections and closing the sale.

Located next to the Main Platform room, the MDRT Store enables you to purchase many of the inspirational presentations you hear. Meet many of the speakers who motivated you in the Speakers' Corner, located within the store. Find DVD, CD and print versions of educational products and a beautiful collection of insignia/recognition items, including Annual Meeting mementos.

Any individual removing merchandise from the MDRT Store without first paying will be asked to surrender their 2016 MDRT Annual Meeting name badge, thereby preventing them from attending the remainder of the meeting. The individual and incident will also be reported to the MDRT Ethics Committee for further action, possibly resulting in revocation of membership.

MDRT Store hours:

SATURDAY, JUNE 11	11 a.m. – 5 p.m.
SUNDAY, JUNE 12	10 a.m. – 4 p.m.
MONDAY, JUNE 13	11:30 a.m. – 5:30 p.m.
TUESDAY, JUNE 14	9:30 a.m.. – 5 p.m.
WEDNESDAY, JUNE 15	9:30 a.m. – 5:30 p.m.

PGA MEETING INVOLVEMENT BOOTH

Volunteering is one of the most rewarding parts of MDRT membership. Join PGA today! Enhance your meeting experience, network with colleagues and make new friends by becoming a Program General Arrangement's (PGA) volunteer. PGA volunteers greet fellow members, check badges, direct attendees and assist in other vital roles during the Annual Meeting. The MDRT Annual Meeting is like no other — become an integral part of it! The PGA Meeting Involvement Booth is located in the Convention Centre: East – Exhibit Hall B.

PGA VOLUNTEER ORIENTATION

PGA volunteers are required to attend an orientation session at 4:30 p.m. on Saturday, June 11, in the Convention Centre: West – English Bay Ballroom A.

QUARTER CENTURY CLUB

A special meeting place has been reserved for MDRT members with 25 years or more of membership. The Quarter Century Club is located at the Pan Pacific Vancouver in the Crystal Pavilion Room (by invitation only).

RECRUITING

Recruiting or attempted recruiting of personnel or agents of one company or firm by another is not permitted during the meeting or in connection therewith. Individuals or companies not complying with this requirement will be asked to leave the meeting.

REGISTRATION HOURS

The registration counters, located in the Convention Centre: East – Exhibit Hall B, will be open the following times:

SATURDAY, JUNE 11	11 a.m. – 6 p.m.
SUNDAY, JUNE 12	7 a.m. – 7 p.m.
MONDAY, JUNE 13	7 a.m. – 4 p.m.
TUESDAY, JUNE 14	7 a.m. – 4 p.m.
WEDNESDAY, JUNE 15	7 a.m. – 2 p.m.

RESPONSIBLE DRINKING POLICY

Because MDRT supports a responsible drinking policy, all MDRT-sponsored receptions will include a choice of nonalcoholic beverages. Alcohol will not be served to anyone under the age of 21.

SPECIAL-NEEDS SEATING

For Main Platform sessions, a section of the Convention Centre: West – Exhibit Hall BC has been reserved for members with special needs who have indicated this on their meeting registration.

PLEASE NOTE: In order to provide for the safety of our attendees, any personal items left unattended in any session room will be confiscated by security. Also, luggage will not be allowed to be brought into any session room at any time. Your understanding and cooperation is appreciated.

SEATING

Seating for all sessions, excluding Main Platform reserved seating, will be on a first-come, first-served basis. In consideration of your fellow attendees, please remember that saving seats is prohibited. Also, please do not leave any personal belongings in any session rooms. Due to fire marshall codes, no one may be admitted once Focus Session rooms are filled to capacity. Please be respectful of MDRT and PGA Traffic Task Force volunteers if you arrive too late to be admitted to the session. Overflow seating is in Convention Center: West – English Bay Ballroom A.

SIMULTANEOUS INTERPRETATION

English is the official language of the 2016 MDRT Annual Meeting. MDRT provides simultaneous interpretation of Main Platform presentations and selected Focus Sessions (when at least 50 registered members have requested interpretation in a common language). MDRT provides simultaneous interpretation for a maximum of 12 languages. If more than 12 languages are requested, simultaneous interpretation will be provided in the first 12 languages that meet the 50-minimum requirement.

Requests for simultaneous interpretation must be made in advance at the time of registration. All requests for interpretation must be received on or before Friday, April 29, 2016.

MDRT provides interpretation headsets and receivers to all registered members who meet the above requirements. The availability of headsets and receivers is not guaranteed to members who did not request simultaneous interpretation when registering in advance.

Only registered Annual Meeting attendees are eligible to receive interpretation equipment and must first obtain their meeting name badge before being able to receive their equipment. The attendee must complete and sign the check-out form and agree to assume full responsibility for the interpretation equipment for the duration of the meeting. The attendee will be billed and must pay USD 400 if the equipment is lost, stolen, damaged, or not returned to the Interpretation Headset Counter in Convention Centre: East – Exhibit Hall B at the conclusion of the meeting. Assisted listening devices will also be available to members who request the service through early and advance registration and are subject to the same terms as interpretation equipment.

SATURDAY, JUNE 11	11 a.m. – 6 p.m.
SUNDAY, JUNE 12	7 a.m.. – 7 p.m.
MONDAY, JUNE 13	7 a.m. – 4 p.m.
TUESDAY, JUNE 14	7 a.m. – 4 p.m.
WEDNESDAY, JUNE 15	7 a.m. – 6 p.m.

ANNUAL MEETING RULES OF CONDUCT

1. Spouses, family members and friends of attendees may not be present at officially designated MDRT functions and events during the Annual Meeting, with the exception of family/spouse meetings, or with an exception voted on by the Executive Committee.
2. To receive Annual Meeting materials, all members and special guests must register at the MDRT Meeting Registration Desk.
3. Giving your badge to another person for purposes of admission to any Annual Meeting function is not permitted.
4. Promotion by members or nonmembers of any goods and services, except member sponsors and exhibitors under provisions of a signed Sponsors and Exhibitors Agreement and other than with the expressed written permission of the Executive Committee, is not permitted.
5. Members who furnish MDRT membership lists may be placing their membership in jeopardy. Likewise, the MDRT Membership Directory is not to be used or loaned for any commercial purpose or other reasons, nor is any portion of it to be reproduced without the expressed prior written permission of MDRT.
6. Recruiting or attempted recruiting of personnel or agents of one company or firm by persons of another company or firm is not permitted during the meeting or in connection therewith.
7. Audio or videotape recording or still photography of all sessions, including Main Platform, is not permitted.
8. Members who wish to use credit privileges at official MDRT hotels shall make such arrangements directly with the hotel. Where credit privileges are granted and used, full payment shall be made within 60 days from the first of the month following the Annual Meeting.
9. Any individual removing merchandise from the MDRT Store without paying for the merchandise will be asked to surrender their badge, thereby preventing them from attending the remainder of the meeting. The individual and incident will also be reported to the MDRT Ethics Committee for further action, possibly resulting in revocation of membership.

Members shall accept and conform to the Code of Ethics and to those rules of conduct which the Executive Committee may determine and publish for the conduct of those attending any such meeting. Adherence to these rules shall be required of members at all such meetings, including all functions, both formal and informal, during and in connection with official MDRT meetings.

CONSENT FOR USE OF PHOTOGRAPHIC IMAGES

Registration, attendance or participation in MDRT meetings or other activities constitutes an agreement by the registrant to MDRT's or its licensees' use and distribution (both now and in the future) of the registrant's or attendee's image and voice in photographs, videotapes, electronic reproductions and audio recordings of such events or activities.

ACTIVITY RELEASE

By attending this meeting, you acknowledge that participation at the meeting and in all related activities are voluntary and optional, and that participation in any of these events are at your own risk. You agree to hold MDRT faultless from any claims, costs or expenses arising from any injury as a result of any person included in your registration fee.

CODE OF ETHICS

Members of the Million Dollar Round Table should be ever mindful that complete compliance with and observance of the Code of Ethics of the Million Dollar Round Table shall serve to promote the highest quality standards of membership. These standards will be beneficial to the public and to the insurance and financial services profession. Therefore, as members you shall:

1. Always place the best interests of your clients above your own direct or indirect interests.
2. Maintain the highest standards of professional competence and give the best possible advice to clients by seeking to maintain and improve professional knowledge, skills and competence.
3. Hold in strictest confidence, and consider as privileged, all business and personal information pertaining to your clients' affairs.
4. Make full and adequate disclosures of all facts necessary to enable your clients to make informed decisions.
5. Maintain personal conduct that will reflect favorably on the insurance and financial services profession and MDRT.
6. Determine that any replacement of an insurance or financial product must be beneficial for the client.
7. Abide by and conform to all provisions of the laws and regulations in the jurisdiction in which you do business.

STATEMENT OF ANTITRUST AND LEGAL COMPLIANCE

There shall be no negative discussions of commercial companies or products. There shall be no discussion or activity for the purpose of any legal compliance preventing any person or persons from gaining access to any market or customer for goods and services, not any agreement or understanding to refrain from purchasing or using any material, equipment, services or supplies. There should be no discussion or activity that may be construed as forestalling or limiting research and development. We, of course, expect your consideration and full compliance with these guidelines, both while in attendance at this meeting and at all times in your business.

ANTI-HARASSMENT

MDRT is committed to providing a positive environment for its employees, members and other guests at all MDRT functions. It has been and remains MDRT's policy to maintain an environment where every employee, member and guest is treated with respect and which is free from all forms of harassment based upon or related to sex, race, color, religion, national origin, ancestry, physical or mental disability, age, sexual orientation, marital status, veteran status, military status, genetic information and any other characteristic protected by applicable law. This includes conduct that creates a hostile, intimidating or offensive environment based on these characteristics. Harassment of any employee, member or guest is strictly prohibited and will not be tolerated. Any individual who violates these requirements will be subject to appropriate remedial action which may include removal from the premises, termination of employment or termination of membership.

SPECIAL RECOGNITION

MDRT Executive Committee

Brian D. Heckert, CLU, ChFC
President

Caroline A. Banks, FPFS
Immediate Past President

Mark J. Hanna, CLU, ChFC
First Vice President

James Douglas Pittman, CLU, CFP
Second Vice President

Ross Vanderwolf, CFP
Secretary

Divisional Vice Presidents

Mohamad Manmohan Abdullah, ChFC, CLU
Member Communications Committee, Division 1

Michael P. Austin, CFP, ChFC
Membership Division

Alessandro M. Forte, Dip PFS
Experience Meeting Division

Roy Hall
Business Development Division

Peter Hill, ChFC
Productivity Division

Todd D. Hruby, LUTCF
Annual Meeting PGA Division

Sarah J. Kaelberer, CFP, ChFC
Annual Meeting Program Development Division

Withoon Lertpanomwan
Member Communications Committee, Division 2

Hamilton P.B. Poynor, CLU, AEP
Special Projects Division

W J. Rossi, CFP, ChFC
Top of the Table Division

Clifford P. Ryan, CLU, ChFC
Finance Division

Niti Sharma, LUTCF
Practice Management Division

Arlyn Tiong Tan, MBA, FChFP
Client Relations Division

John L. Thomas, CLU, MSFS
Guided Development Division

2016 Foundation Officers

James V. Durkin, CFP, CLU
President

Roger A. Seim, MSFS, CLU
Immediate Past President

H. Richard Dobson Jr., CFP
Vice President

Marc A. Silverman, CLU, ChFC
Secretary

Theodore Rusinoff, CFP
Treasurer

2016 Program Development Division

Sarah J. Kaelberer CFP ChFC
Divisional Vice President

Ian Green, Dip PFS
Committee Chair, Annual Meeting Main Platform/Special Sessions

Aaron Lee Hammer, LUTCF
Committee Chair, Annual Meeting Focus Sessions

Caroline Kheng, ChFC
Committee Chair, Annual Meeting ConneXion Zone®

Alphonso B. Franco, RHU, RCIS
Assistant Chair, Main Platform/ Special Sessions

Scott Roger Lebin, RFC, CWS
Assistant Chair, Main Platform/ Special Sessions

Bryson Milley, CFP, CIM
Assistant Chair, Main Platform/ Special Sessions

Susan Catherine Paterson, FChFP
Assistant Chair, Main Platform/ Special Sessions

Hussein A. Halabi
Assistant Chair, Focus Sessions

David R. Wilson, CLU
Assistant Chair, Focus Sessions

David W. Andreoli
Captain, Focus Sessions

D. Kyle Atkins, CLU, CFP
Captain, Focus Sessions

Brad Brain, CFP, CLU
Captain, Focus Sessions

Rajesh Chheda, ACA, CFP
Captain, Focus Sessions

Matthew Charles Collins
Captain, Focus Sessions

Masahiro Hashimoto, TLC, AFP
Captain, Focus Sessions

Pearlyn Koh, BCom(Hons), ChFC
Captain, Focus Sessions

Priti Ajit Kucheria, LUTCF, CFP
Captain, Focus Sessions

David I. Meszaros, CFP, EPC
Captain, Focus Sessions

Kazuhiko Sagara
Captain, Focus Sessions

Sung Ho Shin
Captain, Focus Sessions

Kathleen R. Benjamin, CFP, CPA
Captain, ConneXion Zone®

Rondol Davidson, LUTCF, CLU
Captain, ConneXion Zone®

Thomas R. McCoy
Captain, ConneXion Zone®

2016 Annual Meeting Program General Arrangements Division

Todd D. Hruby, LUTCF
Divisional Vice President

Anthony G. Engrassia, LUTCF, ChFC
Chair, Member Enhancement

David Pritchard, Dip PFS
Chair, Member Logistics

Rino V. Cipparrone, CFP, CLU
Chair, Member Services

Yuka Nakahara-Goven, MBA, CLU
Task Force Director, Traffic General

Peter F. Cote
Task Force Director,
Traffic Main Platform

Manuel Dy Chuaunsu Jr.
Task Force Director, Traffic Sessions

James J. Grabinski, LUTCF, CSA
Task Force Director, Entertainment

Carol Chiarito
Task Force Director,
First Time Experience

Janet N. Ng
Task Force Director,
Meeting Involvement

Santhosh M. Sunny
Task Force Director, MDRT Store

**Adam Steven Blumberg,
CFP, CLU**
Task Force Director, Registration

Matthew T. Hoesly, CFP, ChFC
Task Force Director,
Speaker Relations

Nickolas Adam Cassis, BSc, CFP
Assistant Director, Traffic General

**Timothy Daniel Clairmont,
CFP, MSFS**
Assistant Director, Traffic General

Hady Elias Dagher
Assistant Director, Traffic General

Jeri K. D'Lugin, CLU, J.D.
Assistant Director, Traffic General

Cherian Panavila John
Assistant Director, Traffic General

Chie Yazawa
Assistant Director, Traffic General

J. Forrester DeBuys III, CLU, AEP
Assistant Director,
Traffic Main Platform

Sutram Suresh, FChFP
Assistant Director,
Traffic Main Platform

Laurence Turner, APFS, CFP
Assistant Director,
Traffic Main Platform

James William Johnson
Assistant Director,
Traffic Sessions

Leung Mo Ling Annie
Assistant Director,
Traffic Sessions

Ronnie C. Liu, AEP, ChFC
Assistant Director,
Traffic Sessions

Devang Patel, CFP, CLU
Assistant Director,
Traffic Sessions

Lesley Weiner, ChFC, CFP
Assistant Director,
Traffic Sessions

Kei Yamasaki
Assistant Director,
Traffic Sessions

Meagan S. Balaneski, CFP
Assistant Director, Entertainment

Michelle L. Bender, CFP
Assistant Director, Entertainment

Craig Alan Lilley, CFP, CLU
Assistant Director, Entertainment

Steven P. Arengo, CFP, AIF
Assistant Director,
First Time Experience

Scott Alfred Grant
Assistant Director,
First Time Experience

Aurora Say Yao
Assistant Director,
First Time Experience

Terence Chan Mou Hon
Assistant Director,
Meeting Involvement

Dong Woo Hong
Assistant Director,
Meeting Involvement

Chetan Joshi, CFP
Assistant Director,
Meeting Involvement

Miki Nagumo
Assistant Director,
Meeting Involvement

Chan Ching Han
Assistant Director, MDRT Store

**Maria Estrella Cabana Matunog,
RFC**
Assistant Director, MDRT Store

Jay M. DeFinis, CLTC
Assistant Director, MDRT Store

Naji Haddad
Assistant Director, MDRT Store

Shuhei Ino
Assistant Director, MDRT Store

John Fernandes
Assistant Director, Registration

Kelly G. Herring
Assistant Director, Registration

Travis D. Manning, CFP, CLU
Assistant Director, Registration

**Gregory Pogonowski,
Dip PFS, Cert CIIMP**
Assistant Director, Registration

Martin L. Sobocan, CFP, CLU
Assistant Director, Registration

Penny J. Hardrick, LUTCF
Assistant Director,
Speaker Relations

Colin R. Parkin, Dip FA, CeMap
Assistant Director,
Speaker Relations

Theodore S. Rusinoff, CFP
Assistant Director,
Speaker Relations

IN MEMORIAM

We pay tribute to the following members who have passed away during the past year (as of April 26, 2016):

Kenneth E. Anderson
Sterling, Colorado

Terry M. Anderson, LUTCF
Carterville, Illinois

Eugene S. Asher, CLU
Atlanta, Georgia

Charles G. Beasley
Uvalde, Texas

David C. Bell, CLU
Burlington, Vermont

Alvin G. Bihlmaier
Osborne, Kansas

Herman Blasing, FIC
Ely, Minnesota

Donald E. Brennan, CLU
South Bend, Indiana

Reed W. Brinton, CLU
Salt Lake City, Utah

Seldon C. Brusa, CLU
Lodi, California

Paul R. Buckley Sr., J.D., CLU*
Portland, Maine

Thomas W. Bullock, CLU, ChFC
Pass Christian, Mississippi

C. William Burkhardt, CLU, CPC
Naples, Florida

Calogero A. Cicero, CLU, RHU
Hamilton, Ontario, Canada

Gerald F. Clark
Bradenton, Florida

Robert B. Cleary, CLU
Boston, Massachusetts

Alan J. Cyr, CLU, LUTCF
Fort Wayne, Indiana

Edwin T. Demeritte,
LUTCF, RFC
Miami, Florida

Michael A. Draper, CLU, ChFC
North Haven, Connecticut

Jack E. Eulitt, CLU, ChFC
Charlotte, North Carolina

Don D. Eyford, CLU, ChFC
Vancouver, British Columbia,
Canada

Elwood J. Farmer, CLU
Danville, Illinois

A. Richard Feldman, CLU, ChFC
East Liverpool, Ohio

Marvin C. Franzen
Lexington Park, Maryland

James W. Grigg, CLU, ChFC
Gresham, Oregon

David L. Harris, CLU, CFBS
Kingsport, Tennessee

Leonard M. Hauprich, CLU
Orangeburg, South Carolina

Katsuko Ishii
Yokohama, Japan

Dennis E. Howe
Charlotte, North Carolina

Tokumi Izawa
Tokyo, Japan

David E. Jacobson
Plymouth, Michigan

Chester Thomas John
St. George's, Grenada,
West Indies

Don Jordan, CLU, ChFC
West Chester, Pennsylvania

Kermit B. Kaiser Jr., CLU, ChFC
Memphis, Tennessee

William E. Knoble, CLU, LUTCF
Newport News, Virginia

William H. Koptis, CLU
Cleveland, Ohio

Thomas J. Kranz, CLU
Toledo, Ohio

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Gregory Wong, CLU, ChFC
Tacoma, Washington

Kayoko Yamagishi
Tokyo, Japan

PAST PRESIDENTS

YEAR	PRESIDENT	COMPANY	MEETING LOCATION	MEMBERS
1927	*Paul F. Clark, CLU	John Hancock, Boston, Massachusetts	Peabody, Memphis, Tennessee	32
1928	*William M. Duff, CLU	Equitable – New York, Pittsburgh, Pennsylvania	Book-Cadillac, Detroit, Michigan	39
1929	*George E. Lackey, CLU	MassMutual, Detroit, Michigan	Mayflower, Washington, D.C.	64
1930	*Earl G. Manning	John Hancock, Boston, Massachusetts	Royal York, Toronto, Ontario, Canada	118
1931	*Theodore M. Riehle, CLU	Equitable – New York, New York, New York	William Penn, Pittsburgh, Pennsylvania	168
1932	*Robert A. Brown	Pacific Mutual, Los Angeles, California	The Fairmont, San Francisco, California	125
1933	*M.J. Donnelly	Equitable – New York, New Castle, Pennsylvania	The Stevens, Chicago, Illinois	101
1934	*Thomas M. Scott	Penn Mutual, Philadelphia, Pennsylvania	The Schroeder, Milwaukee, Wisconsin	118
1935	*Caleb R. Smith	MassMutual, Fort Lauderdale, Florida	The Savery, Des Moines, Iowa	124
1936	*Harry T. Wright	Equitable – New York, Chicago, Illinois	Ritz-Carlton, Boston, Massachusetts	143
1937	*Grant Taggart	California – Western States, Cowley, Wyoming	Brown Palace, Denver, Colorado	158
1938	*Jack Lauer	Penn Mutual, Cincinnati, Ohio	The Rice, Houston, Texas	162
1939	*Paul C. Sanborn	Connecticut Mutual, Boston, Massachusetts	The Jefferson, St. Louis, Missouri	163
1940	*Henry G. Mosler	MassMutual, Los Angeles, California	Bellevue-Stratford, Philadelphia, Pennsylvania	154
1941	*H. Kennedy Nickell, CLU	Connecticut General, Chicago, Illinois	Netherland Plaza, Cincinnati, Ohio	171
1942	*Robert P. Burroughs	National Life – Vermont, Manchester, New Hampshire	No meeting due to war	223
1943	*Ron Stever, CLU	Equitable – New York, Los Angeles, California	William Penn, Pittsburgh, Pennsylvania	232
1944	*A.J. Ostheimer III	Northwestern Mutual, Honolulu, Hawaii	The Statler, Detroit, Michigan	408
1945	*John E. Clayton	MassMutual, Newark, New Jersey	No meeting due to war	468
1946	*Louis Behr, CLU	Equitable – New York, Chicago, Illinois	French Lick Springs, French Lick, Indiana	525
1947	*Harold S. Parsons	The Travelers, Corona Del Mar, California	New Ocean House, Swampscott, Massachusetts	726
1948	*Paul H. Dunnavan, CLU	Canada Life, Minneapolis, Minnesota	French Lick Springs, French Lick, Indiana	829
1949	*Paul W. Cook, CLU	Mutual Benefit Life, Chicago, Illinois	Netherland Plaza, Cincinnati, Ohio	824
1950	*Theodore Widing, CLU	Provident Mutual, Philadelphia, Pennsylvania	Haddon Hall, Atlantic City, New Jersey	790
1951	*John O. Todd, CLU	Northwestern Mutual, Evanston, Illinois	Hotel Del Coronado, Coronado, California	949
1952	*Walter N. Hiller, CLU	Penn Mutual, Chicago, Illinois	Mount Washington, Bretton Woods, New Hampshire	1,065
1953	*William T. Earls, CLU	Mutual Benefit Life, Cincinnati, Ohio	The Greenbrier, White Sulphur Springs, West Virginia	1,240
1954	*G. Nolan Bearden	New England Life, Atlanta, Georgia	Hotel Del Coronado, Coronado, California	1,492
1955	*George B. Byrnes, CLU	New England Life, Palos Verdes, California	The Greenbrier, White Sulphur Springs, West Virginia	1,557
1956	*Arthur F. Priebe, CLU	Penn Mutual, Rockford, Illinois	The Kungsholm to Bermuda	2,013
1957	*Howard D. Goldman, CLU	Northwestern Mutual, Richmond, Virginia	The Greenbrier, White Sulphur Springs, West Virginia	2,438
1958	*William D. Davidson, CLU	Equitable – New York, Chicago, Illinois	Banff Hotel, Banff, Alberta, Canada	2,987
1959	*Adon N. Smith II, CLU	Northwestern Mutual, Charlotte, North Carolina	Americana, Bal Harbour, Florida	2,688
1960	*Robert S. Albritton, CLU	Provident Mutual, Los Angeles, California	Hilton Hawaiian Village, Honolulu, Hawaii	3,040
1961	*James B. Irvine Jr., CLU	Northwestern Mutual, Chattanooga, Tennessee	Americana, Bal Harbour, Florida	2,932
1962	*Lester A. Rosen, CLU	Union Central, Memphis, Tennessee	The Queen Elizabeth, Montreal, Quebec, Canada	3,122
1963	*Daniel H. Coakley	New York Life, Boston, Massachusetts	The Kungsholm to Bermuda	3,420
1964	*Alfred J. Lewallen, CLU	Mutual Benefit Life, Miami, Florida	The Diplomat, Hollywood, Florida	3,202
1965	*Iram H. Brewster	Phoenix Mutual, Pittsburgh, Pennsylvania	The Broadmoor, Colorado Springs, Colorado	3,636
1966	*Donald Shepherd	John Hancock, Boston, Massachusetts	Statler Hilton, Boston, Massachusetts	4,076
1967	*Frank E. Sullivan, CLU	Mutual Benefit Life, Newark, New Jersey	Congress Hall, Lucerne, Switzerland	4,616
1968	*Sadler Hayes	Penn Mutual, New York, New York	Masonic Memorial Temple, San Francisco, California	5,078
1969	*Stanley S. Watts, CLU	Equitable – New York, Miami, Florida	The Diplomat, Hollywood, Florida	5,689
1970	*John H. Ames, CLU	Mutual Benefit Life, Morristown, New Jersey	Hilton Hawaiian Village, Honolulu, Hawaii	6,675
1971	*Richard G. Bowers Sr., CLU	New York Life, Keokuk, Iowa	The Washington Hilton, Washington, D.C.	7,589
1972	*James B. Longley, CLU	New England Life, Lewiston, Maine	The Queen Elizabeth, Montreal, Quebec, Canada	8,361
1973	Henry F. McCamish Jr., CLU	MassMutual, Atlanta, Georgia	The Seattle Center, Seattle, Washington	9,587
1974	*C. Robinson Fish III, CLU	Northwestern Mutual, Boston, Massachusetts	Fontainebleau, Miami Beach, Florida	10,987
1975	Jack Peckinpaugh, CLU, ChFC	Indianapolis Life, Muncie, Indiana	Masonic Memorial Temple, San Francisco, California	12,422

*Deceased

YEAR	PRESIDENT	COMPANY	MEETING LOCATION	MEMBERS
1976	*Rulon E. Rasmussen, CLU	New York Life, Phoenix, Arizona	The Hynes Auditorium, Boston, Massachusetts	11,804
1977	*Marshall I. Wolper, CLU	Equitable – New York, Miami, Florida	Atlanta Civic Center, Atlanta, Georgia	12,757
1978	*Jack L. McKewen, CLU	Fidelity Mutual, Birmingham, Alabama	Blaisdell Center, Honolulu, Hawaii	14,742
1979	*Paul L. Oliver Jr., CLU	Prudential of America, San Francisco, California	McCormick Place, Chicago, Illinois	17,205
1980	Millard J. Grauer, CLU, ChFC	Equitable – New York, Chicago, Illinois	The Rivergate, New Orleans, Louisiana	17,406
1981	Clune J. Walsh Jr., CLU	Home Life, Detroit, Michigan	Radio City Music Hall, New York, New York	17,581
1982	*Stanley Liss, CLU	New York Life, New York, New York	Atlanta Civic Center, Atlanta, Georgia	17,737
1983	Jack B. Turner, CLU, ChFC	General American Life, Clarksville, Tennessee	Dallas Convention Center, Dallas, Texas	17,679
1984	*Paul R. Buckley Sr., CLU, ChFC	New England Life, Lewiston, Maine	Radio City Music Hall, New York, New York	18,964
1985	Ron D. Barbaro	North American Life, Toronto, Ontario, Canada	San Francisco Civic Auditorium, San Francisco, California	21,722
1986	*Frank Friedler Jr., CLU	Home Life, New Orleans, Louisiana	Orange County Convention/Civic Center, Orlando, Florida	20,598
1987	Wilmer S. Poynor III, CLU, ChFC	New York Life, Birmingham, Alabama	McCormick Place, Chicago, Illinois	17,051
1988	Arlen I. Prentice	Kibble & Prentice, Seattle, Washington	Atlanta Civic Center, Atlanta, Georgia	16,944
1989	G. Carey Hauenstein, CLU	State Mutual of America, Laurel, Mississippi	Metro Toronto Convention Centre, Toronto, Ontario, Canada	16,792
1990	*David H. Hilton, CLU, ChFC	Northwestern Mutual Life, Chicago, Illinois	San Francisco Civic Auditorium, San Francisco, California	16,393
1991	Seymour Petrovsky, CLU	Business Men's Assurance, Phoenix, Arizona	New Orleans Convention Center, New Orleans, Louisiana	16,297
1992	William T. O'Donnel, MSFS	MassMutual, Chicago, Illinois	McCormick Place, Chicago, Illinois	15,957
1993	Charles D. Marks, CLU, ChFC	Prudential of America, New Orleans, Louisiana	Hynes Convention Center, Boston, Massachusetts	15,721
1994	Lyle L. Blessman	Northwestern Mutual, Englewood, Colorado	Dallas Convention Center, Dallas, Texas	15,686
1995	Robert B. Plybon, CLU, ChFC	Phoenix Home Life, Greensboro, North Carolina	Metro Toronto Convention Centre, Toronto, Ontario, Canada	15,703
1996	Walter G. Schnee III	Phoenix Home Life, Pasadena, California	Anaheim Convention Center, Anaheim, California	18,784
1997	John W. Cruikshank III, CLU	Northwestern Mutual, Deerfield, Illinois	Atlanta Civic Center, Atlanta, Georgia	18,815
1998	Gene L. Mahn, CLU, ChFC	MassMutual, Thousand Oaks, California	McCormick Place, Chicago, Illinois	19,182
1999	Reginald N. Rabjohns, CLU, ChFC	New England Financial, Chicago, Illinois	Ernest N. Morial Convention Center, New Orleans, Louisiana	21,262
2000	Brian H. Ashe, CLU	Independent, Lisle, Illinois	Bill Graham Civic Auditorium, San Francisco, California	23,341
2001	Tony Gordon	Independent, Bristol, England, United Kingdom	Metro Toronto Convention Centre, Toronto, Ontario, Canada	25,037
2002	Marvin H. Feldman, CLU, ChFC	New York Life, East Liverpool, Ohio	Gaylord Opryland Resort and Convention Center, Nashville, Tennessee	28,282
2003	Richard H. Sullenger	GenAmerica Financial, Bakersfield, California	Paris and Bally's Hotel and Casino, Las Vegas, Nevada	27,665
2004	George B. Pickett, J.D., CLU	Valmark Securities, Jackson, Mississippi	Anaheim Convention Center, Anaheim, California	29,652
2005	Adelia C. Chung, CLU, ChFC	Chung Insurance and Investment Group, Honolulu, Hawaii	Ernest N. Morial Convention Center, New Orleans, Louisiana	33,297
2006	Stephen O. Rothschild, CLU, ChFC	Rothschild and Sale, St. Louis, Missouri	San Diego Convention Center, San Diego, California	35,781
2007	Philip E. Harriman, CLU, ChFC	Lebel and Harriman, Falmouth, Maine	Colorado Convention Center, Denver, Colorado	35,662
2008	James E. Rogers, CLU, CFP	Rogers Group Financial Ltd., Vancouver, British Columbia, Canada	Metro Toronto Convention Centre, Toronto, Ontario, Canada	39,340
2009	Walton W. Rogers, CLU, ChFC	W. Rogers and Associates, Annapolis, Maryland	Indiana Convention Center, Indianapolis, Indiana	31,857
2010	Guy E. Baker, MSFS, CLU	BMI Consulting, Irvine, California	Vancouver Convention Centre, Vancouver, British Columbia, Canada	31,142
2011	Julian H. Good Jr. CLU, ChFC	Good Financial Group LLC New Orleans, Louisiana	Georgia World Congress Center, Atlanta, Georgia	35,908
2012	Jennifer A. Borislow, CLU, ChFC	Borislow Insurance, Agency Inc., Methuen, Massachusetts	Anaheim Convention Center, Anaheim, California	37,805
2013	D. Scott Brennan	The Brennan Group, LLC, South Bend, Indiana	Pennsylvania, Convention Center, Philadelphia, Pennsylvania	38,270
2014	Michelle L. Hosely, CLU, ChFC	Resource 1 Inc., Norfolk, Virginia	Metro Toronto Convention Centre, Toronto, Ontario, Canada	42,729

SPECIAL GUESTS

As of April 22, 2016

Chee Keong Ang
National Chief
Agency Officer
AIA Berhad

Belinda Au
Chief Distribution Officer,
Sun Life Financial Asia
Sun Life Financial
Hong Kong

Jennifer Bacarella
Director of Firm
Development
Parkland Securities, LLC

John Baier
Leadership and Agencies
Sales Development
Director
Seguros Monterrey
New York Life

Wade Baldwin
President
Advocis

Naomi Ballantyne
Managing Director
Partners Life

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Senior Vice President of
Shared Distribution
Ameritas Life Insurance
Company

Gary Bennett
CEO
Seguros Monterrey
New York Life

P. Jayarama Bhat
Managing Director and
CEO
Karnataka Bank Ltd.

Jerry Blair
Chief Distribution Officer
Midland National Life
Insurance Company

Debbie Blumhagen
Director, Management
Development and
Industry Relations
AXA Advisors, LLC

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Vice President
Freedom 55 Financial,
Wealth and Estate
Planning Group

Axel Bromley
CEO
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AIA China

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Manda Chan
Chief Agency
Management Officer
AIA International
Assurance Company Ltd.

Amitabh Chaudhry
Managing Director
and CEO
HDFC Standard Life
Insurance Company Ltd.

Zhongde Chen
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Citic Prudential Life
Insurance

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Distribution
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Support, Group Agency
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Antonio de Rosas
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Pru Life UK

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Sun Life Financial Asia

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Grupo Nacional Provincial

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Bonnie Godsman
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GAMA International

Marco Goncalves
Director General
Bradesco Seguros S/A

David Grant
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Honorary President
Panhellenic Association of Insurance Advisors

Gang Gu
General Manager, Hubei Branch
Ping An Life Insurance

John Henle
Head of Life Distribution
Farmers New World Life Insurance

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FWD Life Insurance Company (Bermuda) Ltd.

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PingAn Life Insurance

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Agency Industry Relations Consultant
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Elaine Katindoy
Vice President of Agency Training
Pru Life UK

Wilford Kavanaugh, CLU, ChFC
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Pantipa Khadngam
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AIA Thailand

Linda Kho
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AIA Group

Kho Chui Ing
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COUNTRY Financial

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Gibraltar Life

Michael Kohn
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Ameritas

Raul Kuri
Director of Productivity and Incentives
Grupo Nacional Provincial

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Director
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Philippine American Life

Angela Lee
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Citic Prudential Life Insurance

Thinker Liu
Vice President
Sino-US MetLife

Arleen Llewellyn
Vice President, Career Advisor Engagement
Northwestern Mutual

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President and CEO
Prudential Life Insurance Taiwan

Daniel Macchion
Regional Director
Prudential do Brasil

Rizalina Mantaring
President and CEO
Sun Life of Canada Philippines, Inc.

Anthony Martins, CLU, ChFC
Chief Field Officer, Career Distribution
Securian Financial Group

Kevin Mayeux
CEO
National Association of Insurance and Financial Advisors

Sean McCormack
Chief Operating Officer
MLC Insurance

Mark McLennon
Vice President
Northwestern Mutual

Juli McNeely, CFP, CLU
Immediate Past President
National Association of Insurance and Financial Advisors

Dayton Molendorp, CLU
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National Association of Health Underwriters

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Brendan O'Ciobhain
President
Personal Finance Society

Thomas O'Donnell
Assistant Vice President
New York Life

Sabrina Ong
Associate Director of Group Premier Academy
AIA Group

Stephen Ong
Chief Agency Officer
Manulife Philippines

Gregory Ostergren
Chairman, President and CEO
American National

Liang Pan
General Manager of Jiangsu Branch
Ping An Life Insurance

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Life Underwriters Association of the Philippines

Brigitte Parent
General Manager, Individual Insurance and Wealth
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Anand Pascal
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Prudential Financial

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Advocis

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Life Insurance Corporation of India

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Foresters

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Old Mutual

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BT Financial Group

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Ameriprise Financial

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Farm Family

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Allianz Life Insurance Company of North America

Cliff Wilson, CLU, ChFC
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Life Happens

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PingAn Life Insurance

Minbin Xu
General Manager of Beijing Branch
Ping An Life Insurance

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Great Eastern Life Assurance Company Ltd.

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Korea Post

Wing Ki Yung
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Derek Yung
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Xiaoyu Zhang
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Stephen Zhang
Chief Agency Officer
Sino-US MetLife

Yi Zhang
General Manager of Qingdao Branch
Ping An Life Insurance

Hua Zhang
General Manager of Foshan Branch
Ping An Life Insurance

Yanwu Zhao
Head of Agency Guangzhou
Citic Prudential Life Insurance

Weidong Zhou
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