#MDRT2017

ORLANDO

FLORIDA | USA

2017 MDRT
Annual Meeting

MDRT
ANNUAL MEETING
2017
JUNE 4–7
ORLANDO

PROGRAM BOOK

MDRT®

CONTENTS

Welcome to Orlando and the 2017 MDRT Annual Meeting!

DEAR MDRT MEMBERS AND GUESTS

Welcome to the 2017 MDRT Annual Meeting!

In 1927, 32 insurance producers gathered for the first MDRT Annual Meeting, and here we are, 90 years later, still gathering together to learn, grow and celebrate our MDRT membership. MDRT members may hail from 71 countries around the globe, but we all share a common goal – to be the best financial advisors in the world.

To better serve all meeting attendees, this year we have designed a meeting to help you learn more efficiently in customized, language-specific sessions, and we have also created opportunities for networking, so you can share ideas with peers facing similar challenges. There is a lot to choose from – so I encourage you to use this program book to create a schedule for each day. Here you will find information about speakers and sessions and maps to help you to create a meeting experience that best suits your needs and preferences.

Over the next few days, you will be exposed to innovative ideas that will empower you to reach new levels of success in both your personal and professional life. I can't think of a better place than sunny Orlando, Florida, to set a course for a bright future!

Enjoy the meeting.

Mark J. Hanna, CLU, ChFC
2017 President
Million Dollar Round Table

MDRT EXECUTIVE COMMITTEE

Mark J. Hanna, CLU, ChFC, of Concord, California, is the President of MDRT. He is a 29-year MDRT member with three Court of the Table and 18 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.

Brian D. Heckert, CLU, ChFC, of Nashville, Illinois, is the Immediate Past President of MDRT. He is a 29-year MDRT member with seven Court of the Table and 10 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.

James D. Pittman, CLU, CFP, of Portland, Oregon, is First Vice President of MDRT. He is a 43-year MDRT member with 16 Court of the Table and five 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 the Second Vice President of MDRT. He is a 30-year MDRT member with nine Court of the Table and seven Top of the Table qualifications and a Diamond Knight of the MDRT Foundation. Vanderwolf, a 35-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.

Regina Bedoya, CLU, ChFC, is the Secretary of MDRT. She is a 24-year MDRT member with seven Court of the Table qualifications and one Top of the Table honor and is 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.

KEY AND MAPS

General Event Icons

No Translation

Ticketed Event

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

Meeting Locations

Orange County Convention Center - South Concourse and North Concourse

Hilton Orlando

Hyatt Regency Orlando

Focus Session Icons

Location-Specific Topics

U.S.

Content Tracks

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

Translation Language

Bahasa Indonesia	Mandarin
Cantonese	Portuguese
Hindi	Spanish
Japanese	Thai
Korean	Vietnamese

Hotel Information

A **Hilton Orlando (Co-headquarters hotel)**
6001 Destination Pkwy
Orlando, FL 32819
(407) 313-4300

B **Hyatt Regency Orlando (Co-headquarters hotel)**
9801 International Dr.
Orlando, FL 32819
(407) 284-1234

C **Embassy Suites – Orlando International Drive**
8978 International Dr.
Orlando, FL 32819
(407) 352-1400

D **Residence Inn Orlando Convention Center**
8800 Universal Blvd.
Orlando, FL 32819
(407) 226-0288

E **Rosen Centre**
9840 International Dr.
Orlando, FL 32819
(407) 996-9840

F **Rosen Plaza**
9700 International Dr.
Orlando, FL 32819
(407) 996-9700

G **Rosen Shingle Creek**
9939 Universal Blvd.
Orlando, FL 32819
(866) 996-9939

H **SpringHill Suites Orlando Convention Center**
8840 Universal Blvd.
Orlando, FL 32819
(407) 345-9073

SHUTTLE SERVICE

Complimentary shuttle service will be provided between some official MDRT hotels and the Orange County Convention Center from Saturday, June 3 – Wednesday, June 7. Shuttles will run every 15-20 minutes. Pickup locations from the Orange County Convention Center will be outside the South Concourse Hall A. For special needs transportation, please call +1 (855) 799-6836 at least 20 minutes prior to desired pickup time. Shuttle service will not be available to or from the Hilton Orlando or Rosen Centre hotels, as these are within close walking distance of the Convention Center.

Shuttle service will be provided to all official MDRT hotels from receptions at the Hilton and Hyatt.

Shuttle Bus Schedule

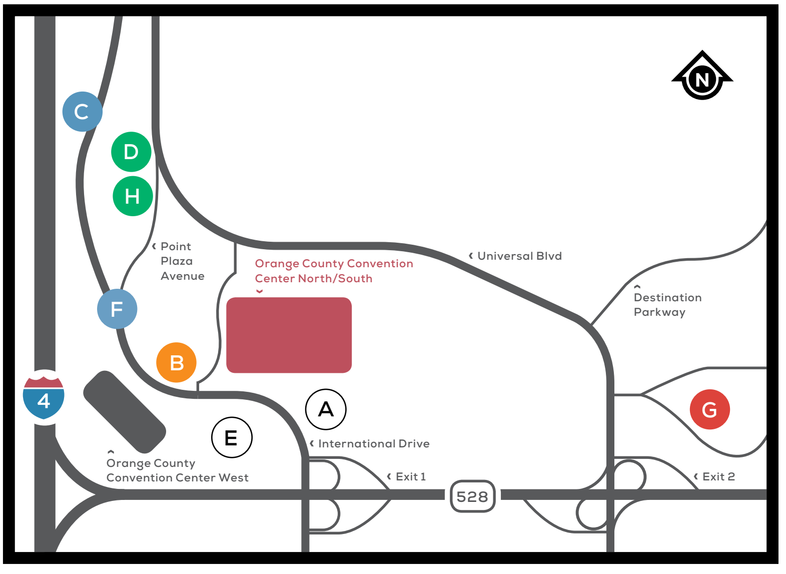
Saturday, June 3	10:30 a.m. – 6 p.m.
Sunday, June 4	6:30 a.m. – 7:30 p.m.
Monday, June 5	6 a.m. – 5:30 p.m.
Tuesday, June 6	6 a.m. – 5:30 p.m.
Wednesday, June 7	6 a.m. – 7 p.m.

Shuttle Bus Routes

Hotel	Pickup Location
› Embassy Suites – Orlando International Drive › Rosen Plaza	**Route 1/Blue Route** *Curbside on International Drive at I-Ride stop*
› Residence Inn Orlando Convention Center › SpringHill Suites Orlando Convention Center	**Route 2/Green Route** *Fountain near Residence Inn on Universal Boulevard*
› Hyatt Regency Orlando	**Route 3/Yellow Route** *Convention entrance*
› Rosen Shingle Creek	**Route 4/Red Route** *Transportation Lobby*

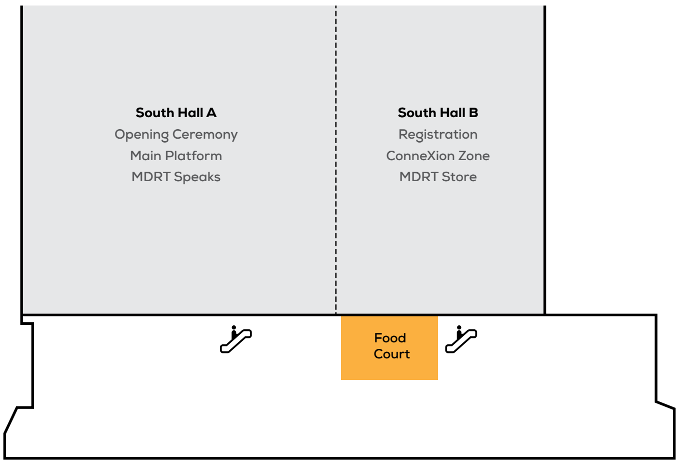
Hotels & Shuttle Route Color

- A **Hilton Orlando (Co-headquarter hotel)**
  NO SHUTTLE SERVICE PROVIDED AT THIS LOCATION
- B **Hyatt Regency Orlando (Co-headquarter hotel)**
- C **Embassy Suites – Orlando International Drive**
- D **Residence Inn Orlando Convention Center**
- E **Rosen Centre**
  NO SHUTTLE SERVICE PROVIDED AT THIS LOCATION
- F **Rosen Plaza**
- G **Rosen Shingle Creek**
- H **SpringHill Suites Orlando Convention Center**



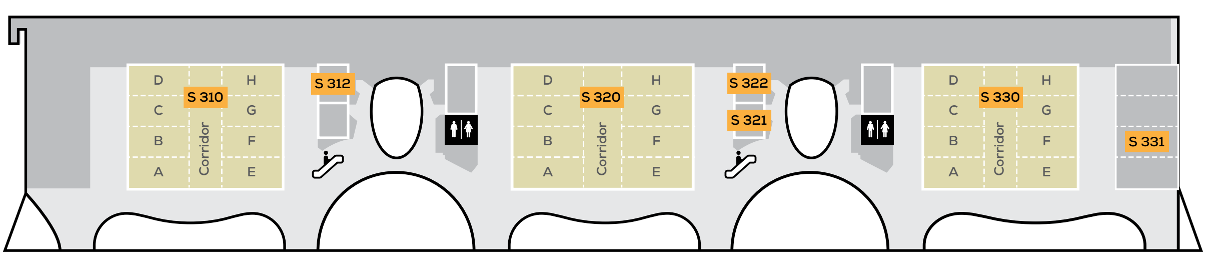
Orange County Convention Center Floorplan

Level I - South Concourse



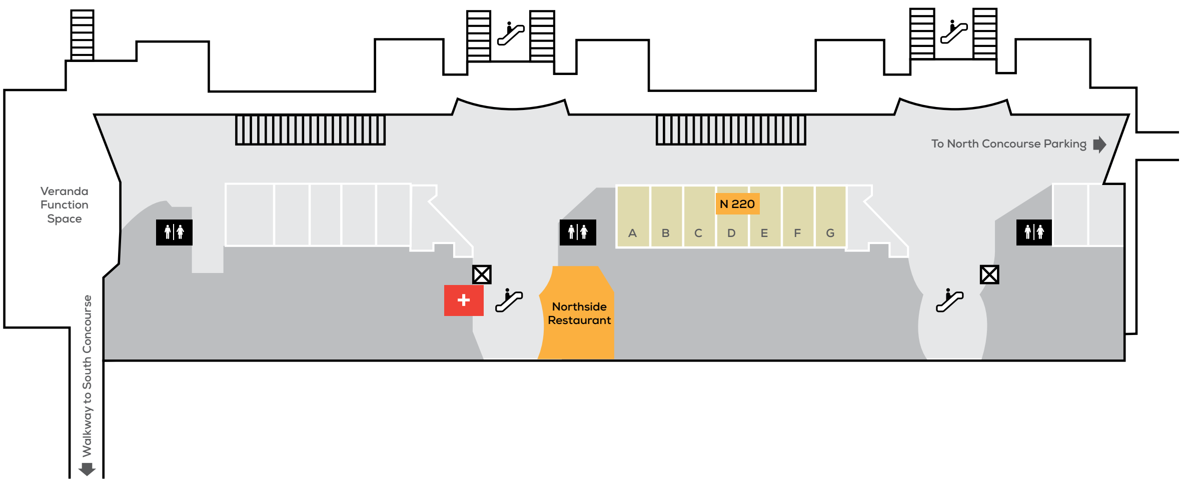
Level II – South Concourse

Level III – South Concourse

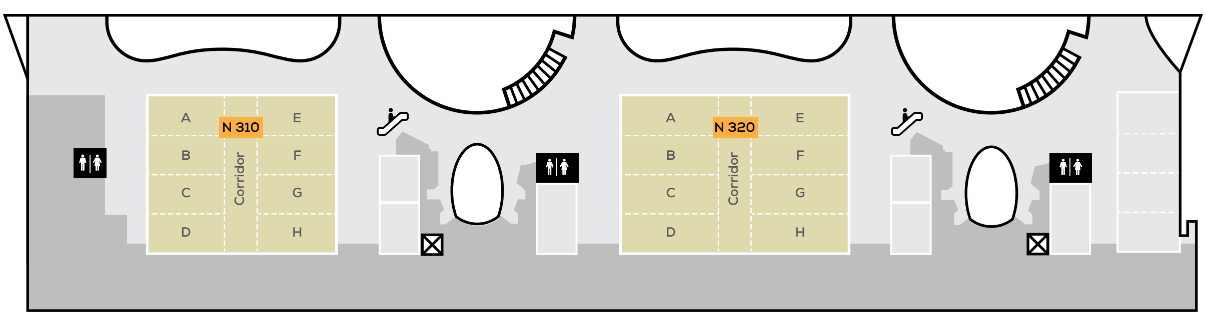


Orange County Convention Center Floorplan

Level II - North Concourse

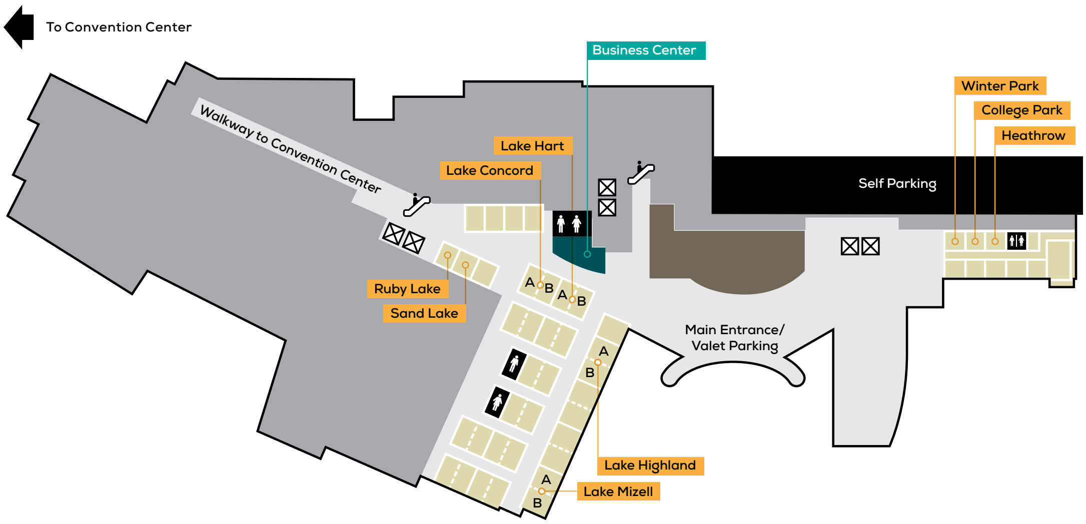


Level III - North Concourse

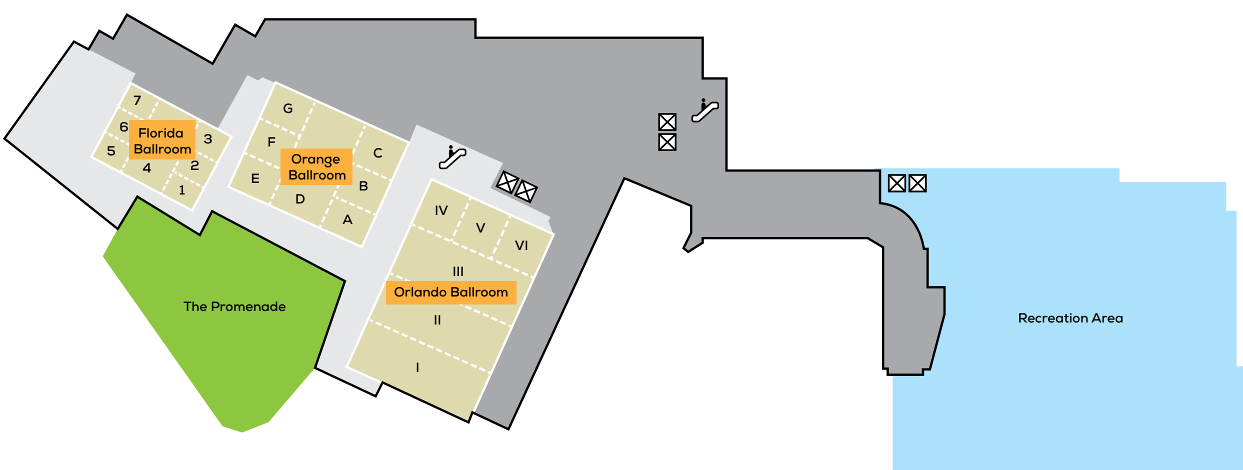


Hilton Orlando Floorplan

Lobby Level (L)

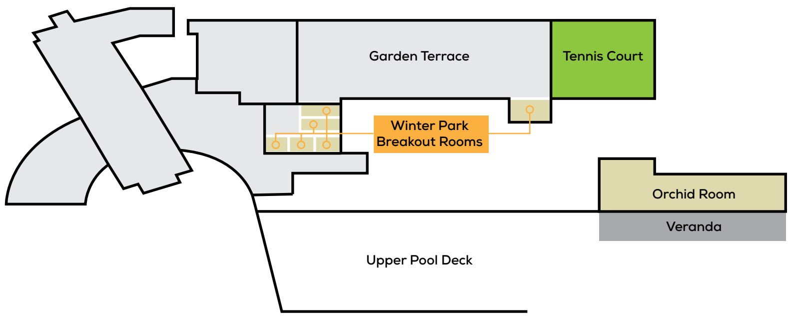


Lower Level (LL)

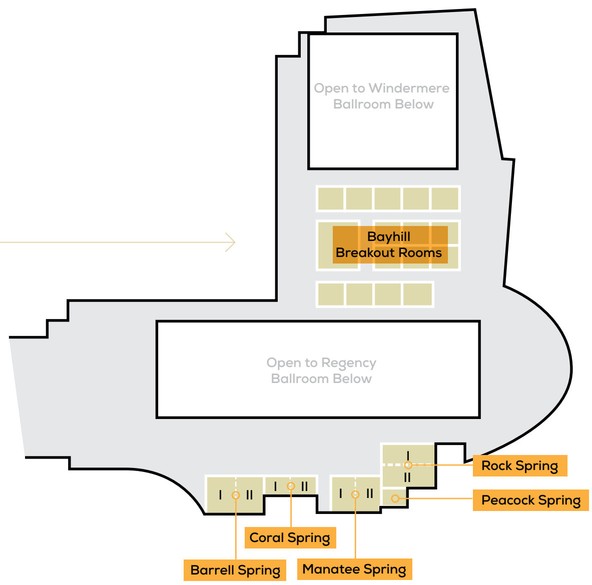


Hyatt Regency Orlando Floorplan

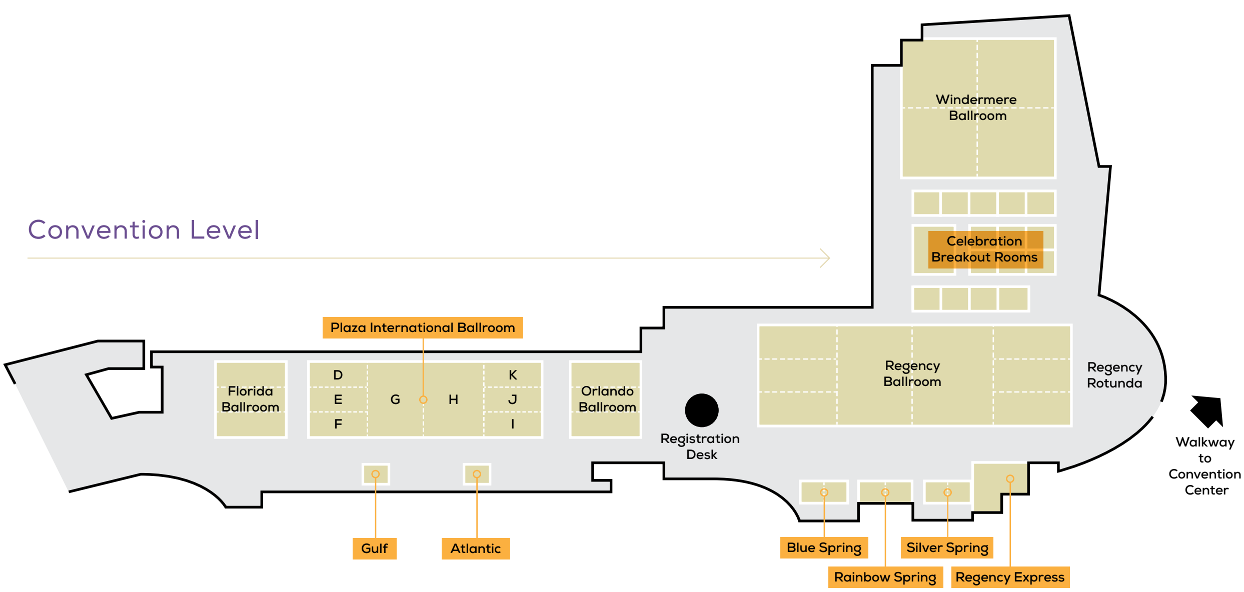
Recreation Level



Lobby Level



Convention Level



SCHEDULE AT A GLANCE

Saturday, June 3, 2017

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.	PGA Volunteer Orientation

Sunday, June 4, 2017

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 & Reception (*2017 Court of the Table and Top of the Table members only*)
5 – 6:30 p.m.	Opening Ceremony
6:30 – 7:30 p.m.	MDRT Foundation Booth open

Monday, June 5, 2017

7 a.m. – 4 p.m.	Registration open
8 – 11:30 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.	Lunch Session: Creating Exceptional Client Experiences
2 – 3 p.m.	Focus Sessions and Idea Exchanges
3:30 – 4:30/5 p.m.	Focus Sessions

Put meeting details in the palm of your hand.

Download the MDRT 2017 app to build your schedule, meet the speakers and connect with attendees.

Tuesday, June 6, 2017

6 – 7:30 a.m.	Breakfast Session: Forget Willpower: How to Achieve More for Your Business
7 a.m. – 4 p.m.	Registration open
8 – 11:30 a.m.	MDRT Speaks
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.	Lunch Session: Reframing Our Fear of Failure
2 – 3 p.m.	Focus Sessions
3:30 – 4:30/5 p.m.	Focus Sessions

Wednesday, June 7, 2017

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 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
10 – 11 a.m.	Focus Sessions and Echo Sessions
11:30 a.m. – 12:30 p.m.	Focus Sessions
2 – 5 p.m.	Main Platform

Simultaneous interpretation is not 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, Idea Exchanges and ticketed events.

Don't lose your badge! There is a **USD 995 fee** for each replacement badge issued. For lost or misplaced badges, go to the On-Site Services counter, located in Convention Center - South Hall B.

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 meeting app.

SATURDAY, JUNE 3

6:30 a.m. – 2 p.m.

MDRT Foundation Service Project

Give Kids the World Village

This year's project supports Promise Appeal charity Give Kids the World Village. Our 200 pre-registered volunteers will witness the importance of the charity's work and the happiness brought to families with a child who has been diagnosed with a life-threatening illness. At the nonprofit "storybook" resort, these families are treated to weeklong, cost-free vacations.

11 a.m. – 4 p.m.

MDRT Foundation Booth

Orange County Convention Center / South Concourse / Level II

11 a.m. – 5 p.m.

MDRT Store

Orange County Convention Center / South Hall B

11 a.m. – 6 p.m.

Registration

Orange County Convention Center / South Hall B

4:30 – 5:30 p.m.

- Cantonese
- Japanese
- Korean
- Mandarin
- Spanish
- Thai

Program General Arrangements (PGA) Volunteer Orientation

Orange County Convention Center / S310

All PGA volunteers should attend this helpful session. President Mark J. Hanna, CLU, ChFC, and PGA Divisional Vice President Rino V. Cipparrone, CFP, CLU, 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.

6 – 7:30 p.m.

Excalibur Reception

MDRT Foundation Excalibur Society Members and 2017 Inner Circle Society Donors (by invitation only)

Tapa Toro

MDRT Store

Bring the 2017 Annual Meeting excitement and inspiration home with you.

Exclusive Annual Meeting merchandise

Customized T-shirt stand

Meeting keepsakes

Instant Annual Meeting recordings

Explore the store and find

- Speaker and member-author signings
- Personalized membership plaques
- Insignia Collection items
- Educational products

Find your MDRT merchandise in the MDRT Store

Orange County Convention Center
South Hall B, Level II

Visit the store online, anytime, at mdrtstore.org and register to see members-only items.

SUNDAY, JUNE 4

7 a.m. – 7 p.m.

Registration

Orange County Convention Center / South Hall B

10 a.m. – 4 p.m.

ConneXion Zone

Orange County Convention Center / South Hall B

10 a.m. – 4 p.m.

MDRT Store

Orange County Convention Center / South Hall B

10 a.m. – 4 p.m.
&
6:30 – 7:30 p.m.

MDRT Foundation Booth

Orange County Convention Center / South Concourse / Level II

1 – 3:30 p.m.

- Cantonese
- Japanese
- Korean
- Mandarin
- Spanish
- Thai

Court of the Table and Top of the Table Program & Reception

This event is for 2017 Court of the Table and Top of the Table members only.

1 – 2:30 p.m.

From Zero to Good: How to Build Your Practice

Cameron Herold / Hilton / Orange Ballroom DE

Managing business growth can be an exhilarating experience, but it can also be an intimidating one. Herold, known around the world as "The Business Growth Guru," is the mastermind behind hundreds of companies' exponential growth, guiding his clients to double their profit and revenue in three years or less. In this dynamic session, Herold reveals the systems all companies need to grow, and how to do it while making a profit.

2:30 – 3:30 p.m.

Reception

Hilton / Florida Ballroom

5 – 6:30 p.m.

- Bahasa Indonesia
- Cantonese
- Hindi
- Japanese
- Korean
- Mandarin
- Portuguese
- Spanish
- Thai
- Vietnamese

Opening Ceremony

Presider: Mark J. Hanna, CLU, ChFC / Orange County Convention Center / South Hall A

The Opening Ceremony will feature inspiring speakers who will set the stage for the three great days ahead. In addition to their motivational messages, enjoy live musical entertainment and the traditional MDRT Flag Ceremony. All are invited to wear the traditional clothing of their home country to celebrate the diversity and global connectedness of MDRT.

(doors open at 4:15 p.m., live music begins at 4:30 p.m.)

Opening	Mark J. Hanna, CLU, ChFC
Flag Ceremony	
Moment of Reflection	Jonathon M. Hanna
Musical Interlude	Dami Im
Global Citizenship	Chris Bashinelli
Meet Your Meeting	Eric Jones
Keynote Speech	To be announced

MONDAY, JUNE 5

7 a.m. – 4 p.m.

Registration

Orange County Convention Center / South Hall B

8 – 11:30 a.m.

Main Platform

Orange County Convention Center / South Hall A

(doors open at 7:15 a.m., live music begins at 7:30 a.m.)

Presiders	Mark J. Hanna, CLU, ChFC, and Brian D. Heckert, CLU, ChFC
Understanding a Different Perspective	Vinh Giang
Evolving Ourselves	Juan Enriquez
Without Limits	Caroline Casey
Break	
Musical Interlude	Dami Im
Delivering Happiness	Jenn Lim
Standing on the Edge of the Future	Mark J. Hanna, CLU, ChFC
The Measure of a Person	H. Richard Dobson Jr., CFP
The Power of Hope	Pamela Landwirth
Matter	Peter Sheahan

11:30 a.m. – 5:30 p.m.

ConneXion Zone

Orange County Convention Center / South Hall B

11:30 a.m. – 5:30 p.m.

MDRT Store

Orange County Convention Center / South Hall B

11:30 a.m. – 5:30 p.m.

MDRT Foundation Booth

Orange County Convention Center / South Concourse / Level II

12 – 1:30 p.m.

Lunch Session: Creating Exceptional Client Experiences

Mike Staver / Hilton / Orange Ballroom B

The client experience is the single most critical factor in determining your success. Today the client – and only the client – defines what that experience is and how much it is worth. Learn how to create a unique differentiator for yourself in the marketplace, identify key strategies for reinventing your client experience model, and deliver a wildly successful experience for each and every one of your clients from start to finish. Lunch will be served from 12 to 12:30 p.m. Program will begin and lunch service will end promptly at 12:30 p.m.

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

2 – 3 p.m

Idea Exchanges

Interactive sessions where attendees are encouraged to participate. A moderator will facilitate audience members sharing their best sales, practice management and marketing ideas which have helped them increase productivity and foster professional improvement.

Cantonese	Convention Center – S330 E
English	Hilton - Orlando Ballroom IV
Hindi	Convention Center – S331
Japanese	Convention Center – S320 A
Korean	Convention Center – S320 F
Mandarin	Convention Center – N320
Spanish	Hilton – Orlando Ballroom V-VI
Thai	Convention Center – S330 A

FOCUS SESSIONS 2–3 P.M.

Client Strategies

Bahasa Indonesia

Vietnamese

Irreplaceable: Grow Like Never Before

Taylor Marklin Sledge Jr. / Hilton / Orlando Ballroom I

Join Sledge as he shares what he has learned from great producers and mentors about production growth and creating an irreplaceable business model. There are common threads such as helping others before you help yourself, working with a great team of staff members allowing you to leverage your best skills, and ultimately building a business that becomes a critical part of your clients' lives.

Protection

Creating Unique Benefits for Business Owners and Their Employees

Matthew E. Schiff, CLU, ChFC / Hilton / Orlando Ballroom II

There are many determinations to make when working with small- to mid-size companies and their employees. In this session, Schiff addresses how to figure out prospects' needs and create benefits for employees regardless of insurability. Taking into account limits of section 409A of the IRS code, this presentation will help identify if clients are more in need of current or future deductions and taxable or non-taxable income. In addition to providing an overview of designing executive benefits, Schiff will also discuss tax and accounting benefits for businesses and designs that can provide benefits to the "uninsurable."

Retirement/ Wealth Planning Strategies

Hindi

Portuguese

Spanish

Do Your Clients Know What Their Income Will Be in Retirement? They Should!

Clay Gillespie, CFP, CIM / Hilton / Orange Ballroom DE

Many of our clients are reaching the age when they need to start generating income from their retirement savings and pension entitlements. Gillespie will discuss how you need to reframe the retirement discussion, talk the retirement language and develop the appropriate strategy to help your clients understand how much income they will have in retirement and how you plan on helping them achieve it.

Practice Management

Cantonese

Japanese

Korean

Thai

Synergy: 1+1=3

Matthew T. Hoesly, CFP, ChFC / Michelle L. Hoesly, CLU, ChFC

Orange County Convention Center / S310

Hoesly and Hoesly will share how they have created a joint approach to working with clients, and how that has enabled both of them to produce more than they could have by themselves. They will describe how they grew their systems and technology to facilitate communication with clients and each other, how they take advantage of the best fit with a client to decide who takes lead on each case, and how they created their succession plan and communicated it to clients. Attend this session to learn effective methods of communication, scheduling and prospecting.

Client Strategies

Presented in Mandarin

Single Case to MDRT Year After Year

Willis Wong Wai Kwong / Orange County Convention Center / N310

Some people claim that qualifying for MDRT for the first and second time can be as much about luck as skill, and that it's the third year of qualification that proves you are truly great at what you do. Wong Wai Kwong will share how to qualify for MDRT with ease year after year, even after accounting for the ups and downs we all experience. You will learn how to develop business in your daily life, overcome obstacles and set long-term goals, all while maintaining a well-balanced life.

Top of the Table

It's Not What You Say; It's How You Say it

Dale W. Martin, CLU, ChFC / Hilton / Orlando Ballroom III

It's hard enough to get in front of the high-net-worth client, so once you do, you can't afford to make mistakes. Once you do get the opportunity, how do you explain the concepts in a manner they understand? How do you answer common objections that clients, CPAs and attorneys often have? Martin will use actual cases and proven techniques to show you how to overcome these objections and discuss each part of the process and give specific details on what to say and how to say it.

FOCUS SESSIONS 3:30–4:30 P.M.

Whole Person

Presented in Cantonese

Make MDRT a Part of Your Life

Hung Chan / Orange County Convention Center / S330 E

Chan believes it is possible to make MDRT even without many resources or a wide network. She discusses how both mental toughness and physical strength contribute to your ability to deal with pressure and develop solutions in your career. She will touch on key lessons she learned from her parents that developed her EQ, reinforced how perseverance is the key to success and put her on the path to MDRT.

FOCUS SESSIONS CONTINUED 3:30 – 4:30 P.M.

Client Strategies

Presented in Japanese

Essential Leadership in Sales

Naoki Yonetani / Orange County Convention Center / S320 A

What is your leadership style? Understanding the correlation between leadership and sales success is the key to good fortune in the financial services field. Yonetani will share the history behind this correlation and introduce the latest findings that continue to support it. In this interactive session, attendees will discuss essential leadership skills with each other.

Marketing

Presented in Korean

From Agent to Producer By Employing Staff and Applying Technology

In Kyo Kim / Orange County Convention Center / S320 F

Finding quality prospects is the key to continuously achieving success as a financial advisor. While it is very important to find prospects through referrals from existing clients, it is more efficient to engage in mass-marketing targeting business clients. Kim will offer experience-based thoughts on how to obtain a database of all employees within a company and find a large number of prospects through retirement annuities and group insurance contracts.

Whole Person

Presented in Mandarin

The Secret of Success

Sue Wee Lee / Orange County Convention Center / N320 (overflow in N220)

Due to a true love for the profession, Lee works very hard and endeavors to be the best and most unique advisor. She serves her clients with care and brings them peace of mind. In this session, she will share ways to be unique, deal with high-end clients and stay motivated.

Marketing

Presented in Mandarin

Referral Strategies for Client Development

Eunice Chen / Orange County Convention Center / N310

Do you want to know how to exponentially grow your business through referrals and build your client base from one to 100 to more than 1,000? Chen will explain how to set the stage for referrals in your target market and how to market yourself through word of mouth.

Client Strategies

Presented in Spanish

Prospecting Workshop

Alvaro Aldrete Morfin II, CLU, FSS / Hilton / Orlando Ballroom V-VI

In this prospecting workshop, simple ideas will be shared on how to ask for referrals. At the end of the session, participants will leave with a list of at least 90 names they can call, as soon as they return home from the Annual Meeting. Topics covered will include statistics, habits, key moments to ask for referrals and "outside the box" ideas to get referrals.

Client Strategies

Presented in Thai

Simple Sales Ideas to Increase Production

Juntima Narawongsanon / Orange County Convention Center / S330 A

Narawongsanon will discuss ideas you can implement to change the way you do business – increasing your production and improving your efficiency. Topics include simple sales ideas you can present to clients in five minutes, as well as more advanced sales ideas you can use for the big case. Leave this session with the ability to work less and accomplish more, all while getting twice the referrals!

Practice Management

How the DOL Has Already Affected You, and Other Legislative Updates

Judi Carsrud / Hilton / Orlando Ballroom IV

Understanding the DOL's final rule on fiduciary advice for retirement savers will be essential for those working with plan sponsors, plan participants and IRA holders. Carsrud, director of federal relations with NAIFA, will explain the rule and what exemptions are available for different compensation arrangements. After this session, you will know when you are providing fiduciary advice and which compensation arrangements are prohibited. You will also learn how to organize client databases and recordkeeping to protect against frivolous complaints. Carsrud will also discuss what changes to expect as the marketplace adjusts to this very complicated rule.

This session will be repeated Wednesday, 10 a.m.

FOCUS SESSIONS 3:30–5 P.M.

Whole Person

Lead with Levity: Strategic Humor for Leaders

Karyn Buxman, CSP, CPAE / Hilton / Orlando Ballroom II

Buxman will teach you how to utilize the often overlooked leadership strategy of humor and levity. In fact, many of the world's greatest leaders – from Winston Churchill to Abraham Lincoln to the Dalai Lama – understood the power of humor. When humor is combined with rhetoric, eloquence and knowledge, clients and prospects are moved to action. This is not just conjecture; the power of humor has been proven by neuroscientists, psychologists and business researchers worldwide. Buxman will discuss how to gather humorous material and how to use humor as a leadership skill, even if you are not funny. She will also cover four humor styles and when to use each of them.

Protection

Bahasa Indonesia

Hindi

Your Legacy – Pay it Forward as a Prince or Pauper? Communicating Your Value Proposition and Understanding How Clients Make Decisions

Jeffrey Scott, CFP, ChFC / Hilton / Orlando Ballroom I

By helping clients understand the importance of life insurance, advisors can help empower them with the responsibility for the purchasing decision. How do advisors communicate that value? Scott explains how clients learn, how that process influences their decision-making and how advisors can guide them along their journey from recognizing a need to purchasing a product and beyond. Scott will also detail the primary reasons why people need life insurance and what causes clients to allow their policies to lapse.

Marketing

Portuguese

Spanish

Vietnamese

Sell and Manage 10 Times the Clients in 3 Days Per Week

David Batchelor, Dip PFS, CFP / Hilton / Orange Ballroom DE

We are limited to 24 hours a day and seven days a week, and if we work that much, we will destroy ourselves and our families. But by using multi-client events as your main source of contact, you can significantly reduce your working hours and greatly increase client satisfaction and loyalty. Batchelor will show you how he uses public education seminars to attract and sell prospects. He will also discuss how he uses client review workshops to perform multiple client reviews in just a few hours. This is a radical approach which will change the way you do business and run your practice.

Practice Management

The One-Page Business Plan for Million Dollar Top Producers

Jim Horan / Hilton / Orlando Ballroom III

Financial advisors sell planning every day, and yet most do not have a clear, concise blueprint for their own business. To move to Top of Table and beyond, it's essential to become more disciplined in all aspects of your business. The discipline starts with being able to craft a clear, actionable business plan that not only makes sense to you, but can be understood by all members of your team. In this highly interactive workshop, participants will learn how to create a one-page blueprint for growth, profitability and sustainability. The next level of success is never an accident – it always starts with a plan!

Client Strategies

Presented in Hindi

Differentiate Yourself

Radhakrishnan Gopinath / Orange County Convention Center / S331

Prospecting is not just collecting names and contact details; it is gaining information for a good start to your sales approach. Every family – rich, super rich or middle class – needs life insurance. Where they differ is in the design and the level of insurance needed. Gopinath will discuss how to position yourself and your services differently in different markets. You will learn how to differentiate your branding efforts, media selection and documentation for each segment. Gopinath will show you how a segmented approach will help you use your time more efficiently and earn utmost respect from prospects in a short time.

Top of the Table

Cantonese

Japanese

Korean

Thai

How to Make Millions Each Year and Work Just 50 Days

Donald P. Speakman, MSFS, CFP / Orange County Convention Center / S310

Over the past 38 years, Speakman has built his practice using variable annuities so that he only works a small percentage of the year – and still earns USD 3 million. He explains how he accomplished this by building recurring revenue, delegating and building staff, retaining clients he loves working with, seminar selling and more. He also talks about how MDRT and Top of the Table have helped in his success.

5 – 6 p.m.

Quarter Century Club

Quarter Century Club members only

Hyatt / Orlando Ballroom

5:30 – 6:30 p.m.

Top of the Table Reception

2017 Top of the Table members only

Hyatt / Plaza International Ballroom DEF

TUESDAY, JUNE 6

6 – 7:30 a.m.

Breakfast Session: Forget Willpower: How to Achieve More for Your Business

Debra Searle / Hilton / Orange Ballroom B

Much of our success (and failure!) in business comes down to the mindset with which we approach our daily challenges and future business goals. A novice rower, Searle began her adventure to row the 3,000 miles of the Atlantic Rowing Race with her husband. When he had to be rescued from their plywood boat, she completed the race solo. The tools and strategies she discovered during her row are the ones she still relies on now to grow her businesses. Searle focuses on the practical ways we can stop relying on willpower and start implementing daily habits that allow us to make major changes in our businesses. Breakfast is served from 6 to 6:30 a.m. The program will begin and breakfast service will end promptly at 6:30 a.m.

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

7 a.m. – 4 p.m.

Registration

Orange County Convention Center / South Hall B

8 a.m. – 11:30 a.m.

MDRT Speaks

Orange County Convention Center / South Hall A

(doors open at 7:15 a.m., live music begins at 7:30 a.m.)

Presiders	Ross Vanderwolf, CFP, and James D. Pittman, CLU, CFP
Lessons Learned	James D. Pittman, CLU, CFP
Tomorrow's Practice	
Business Generation Through Compliance	Ian Green, Dip PFS
Process, Process, Process	Benjamin Harding, CLU, CFP Kimberly A. Harding, CLU
Building a Culture of Health and Well-Being	Mark S. Gaunya, GBA
Turning Clients Into Advocates	Chris Leach, Dip PFS
Leveraging Technology	Ryan J. Pinney Steven A. Plewes, CLU, ChFC Edward C. Skelly, CLU, ChFC
Brain Break	

MDRT SPEAKS CONTINUES ON FOLLOWING PAGE

8 a.m. – 11:30 a.m.

MDRT Speaks Continued

Changing People's Lives	
Making a Difference	Roy Hall, ADFP
Money Monsters to Monday Masters	Jae S. Lee
Objections	Sanjay Tolani, FLMI, MBA
Financial Oxygen	Alphonso B. Franco, RHU, RCIS Godfrey Phillips, FChFP, J.P.
If Not You, Who?	Peter Jason Byrne
The Box	Guy E. Baker, MSFS, CFP
Break	
WOW Client Engagement Ideas	
Selfless Referrals	Rick Hu
Your Lasting Gift	Sherry Lee Ong
Powerful Questions	Gregory Fok, CFP
It's Not Just Business; It's Personal	Matthew T. Hoesly, CFP, ChFC
Engagement	Richard Pearse Collins
Adapt and Adopt	Jennifer A. Borislow, CLU Michelle L. Hoesly, CLU, ChFC
Brain Break	
MDRT Takeaways	
Put Me On Your Payroll	George B. Sigurdson, CLU
Questions to Opportunity	Matthew Charles Collins
Triple Your MDRT Results	David Batchelor, Dip PFS, CFP
Inspiration From Mentors	Soochang Hur

8 a.m. – 11:30 a.m.

MDRT Speaks Continued

MDRT Takeaways Continued

Personal Value Statement	Terence Chan Mou Hon
Out of Sight, Out of Mind	Neeraj Chauhan, CFP, BCom
Business Building Ideas Successfully Implemented	Bryson Milley, CFP, CIM
A New Lens	Daniel O'Connell, MBA
Walking the Tight Rope	William J. Rossi, CFP, ChFC
From Good to Great to Joy	Sol Hicks

11:30 a.m. – 5:30 p.m.

ConneXion Zone

Orange County Convention Center / South Hall B

11:30 a.m. – 5:30 p.m.

MDRT Store

Orange County Convention Center / South Hall B

11:30 a.m. – 5:30 p.m.

MDRT Foundation Booth

Orange County Convention Center / South Concourse / Level II

12 – 1:30 p.m.

Lunch Session: Reframing Our Fear of Failure

Adam Kreek / Hilton / Orange Ballroom B

Successful teams and organizations require a healthy relationship with failure. Too much fear – or too little – signals future disaster. Managing your fear of failure effectively allows for individual authenticity and reclaimed confidence, and you need both for sustained success and performance. Learn to reframe your fear of failure and reclaim lost confidence by separating self-worth from past success and failure, and differentiating between blameworthy and praiseworthy failure. Lunch is served from 12 to 12:30 p.m. The program will begin and lunch service will end promptly at 12:30 p.m.

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

FOCUS SESSIONS 2–3 P.M.

Whole Person

The Power of Planning: Goals vs. Desires

Randy Marshall, Ph.D. / Hilton / Orlando Ballroom III

Planning is the master key that unlocks sound strategy and ultimately a realistic vision. The problem comes in defining what a goal is as the central part of the planning process. Many financial advisors operate with the wrong perspective, and there is a huge difference between a goal and a desire. The difference centers on what can we control and what we cannot. Marshall will outline a clear three-month plan that increases outward productivity and gives inner peace. Knowing the difference between a goal and a desire has saved careers and given many advisors a new lease on why they do what they do.

Client Strategies

Portuguese

Spanish

One-Page Presentations that Sing

Robert Gawthrop, CFP, CLU / Hilton / Orange Ballroom DE

Gawthrop will walk through a number of highly effective, simple, one-page presentations that he uses to help clients make decisions and take action. Whether your focus is on life insurance, living benefits or investment management, Gawthrop has a one-page presentation that you can use effectively to increase your results and help more clients. Gawthrop will also address the importance of having hobbies outside of your business which can help you become a more successful and well-rounded whole person.

Retirement/ Wealth Planning Strategies

Retirement Income Planning: Take your Wealth Management Business to the Next Level

Brad Brain, CFP, CLU / Hilton / Orlando Ballroom II

Brain will share practical tips you can implement immediately, which will help you deliver professional advice that is consistent with your client's retirement objectives, even in the face of a changing industry. In this session, you will also uncover cross-selling opportunities, discover ways to reduce compliance headaches and liability exposure, and learn how to increase revenue by growing assets under administration.

Marketing

What Color is Your Business?

Jenny Brown, CFP, FChFP / Hilton / Orlando Ballroom IV

While you may not care what information is out there shaping your public identity, it's giving the public a perception of your business, and perceptions mean everything. Even your lack of presence speaks volumes. Brown will discuss how branding can help you control and manage your public identity and provide constant reinforcement of what you stand for and what your clients and referral partners can expect. If you get branding right, you can get your reputation right and become a trusted partner to your clients.

Practice Management

Cantonese

Japanese

Korean

Thai

How to Attract Quality Clients and Differentiate Yourself In Today's Competitive Market

Louis J. Cassara, CLU, ChFC / Orange County Convention Center / S310

If you would like to learn the mindset and skill set of a 21-time Top of the Table producer, and how to attract the case of your career, this session is for you. Cassara is a nationally recognized advisor and industry coach. He will share his time-tested and field-proven client creation process which has helped thousands of advisors become skillful cultivators of productive and profitable client relationships. His concepts, tools and applications will help you open larger cases, and get your prospects and clients to commit to your solutions in a shorter period of time.

Client Strategies

Presented in Cantonese

Court of the Table is Not a Dream

Monica Wong Siu Chun / Orange County Convention Center / S330 E

Wong Siu Chun knows the steps to elevate your game from MDRT member to Court of the Table qualifier. In this session, she shares what works for her: keeping an excellent attitude, strengthening her management abilities, establishing feasible and practical objectives, establishing a personal brand, taking delight in helping others and, most importantly, daring to dream! Leave this session equipped to become an outstanding insurance underwriter.

Marketing

Presented in Japanese

The Sales Method that Got Me to Top of the Table

Hiroaki Okada / Orange County Convention Center / S320 A

By attending the Annual Meeting year after year, Okada finally qualified for Top of the Table in his 12th year of MDRT membership. What finally pushed him over the top? He will share the "three Ms" – method, market and mindset – that led him to the Top of the Table and can do the same for you.

Practice Management

Presented in Korean

Managing Daily Activities and Maintaining Consistency

Doo Hyun Kim / Orange County Convention Center / S320 F

As agents get more experienced, they tend to reduce their activities. They vigorously plan things ahead and work hard in the beginning of their career, but then find themselves doing things other than consultations. You will learn to manage your clients and your workload. The key is to keep up the initial volume of activities and improve performance by developing the habit of calling 10 people a day.

FOCUS SESSIONS CONTINUED 2–3 P.M.

Practice Management

Presented in Mandarin

Become a Life Member Through Annual Review Routines

(Anner) Hsuan Hui Lu / Orange County Convention Center / N310

Hui Lu will explain step by step how her annual review system works and how it helps her qualify for MDRT year after year. She will teach you how to build stronger client relationships, close large policies and turn clients into advocates who actively provide referrals. She'll share her personal story from how she entered the business as a new agent to how she became a senior consultant. Through eight stories and nine successful cases, she'll inspire you to positively focus on your daily work and follow to path to become an MDRT Life member.

Retirement/ Wealth Planning Strategies

Presented in Mandarin

Golden Keys to Wealth Management

Chia Fang Hsieh / Orange County Convention Center / N320 (overflow in N220)

Attend this presentation to learn how to build a wealth management system that is able to quantify your clients' financial goals. Hsieh will discuss how to use high-leverage tools to secure retirement in the low interest rate environment as well as how to effectively transfer estates to the next generation with insurance and trusts.

Whole Person

Presented in Spanish

8 Winning Attitudes to Connect You with Prospects

Martin Pfister / Hilton / Orlando Ballroom V-VI

Before you can form a relationship with clients, you must have a strong sense of your own character. Afterward, you can communicate the benefits of products to clients and understand what compels them to buy. Pfister discusses attitudes that help develop your perspective as a Whole Person and explains how those approaches will benefit you in your work. Advisors will emerge with a clear sense of purpose and a positive outlook for their personal and professional life.

Whole Person

Presented in Hindi

The Magic of Relationships

Rajesh Satoskar / Orange County Convention Center / S331

Clients buy life insurance to protect their loved ones, so it is important for advisors to appeal not just to clients' minds but their hearts. Satoskar demonstrates how he achieves Top of the Table-level production by focusing on his relationship with clients and continually building connections with new prospects. By prioritizing these relationships, he helps clients achieve their goals and see the advisor as a trusted professional who can convert their emotions into a financial plan for the future.

Client Strategies

Presented in Thai

Excellent Service Leads to an Infinite Market

Natthamon Chotthamrongsin / Orange County Convention Center / S330 A

Consistent service that makes clients feel relaxed – instead of pressured – in every encounter should be the goal for each of us as financial advisors. Good service like this makes clients feel we prioritize their feelings and well-being over our own profits. Attend this session to learn how to achieve this kind of comfortable relationship with clients and, in doing so, increase your production as well.

Top of the Table

Bahasa Indonesia

Hindi

Vietnamese

An Informal Learning Session with MDRT and Top of the Table Leaders

Adelia C. Chung, CLU, ChFC; Marvin H. Feldman, CLU, ChFC; Brian H. Ashe, CLU (Moderator) / Hilton / Orlando Ballroom I

Participate in an open Q&A session with MDRT Past Presidents Feldman and Chung. Learn how they have run their practices and maintained a strong work-life balance to be consistent MDRT and Top of the Table qualifiers. They will also discuss how to delegate authority and responsibility to staff, how they systematize their prospecting, and how they maintain communications with clients. You will leave with sales ideas you can use immediately to increase productivity, while also balancing work and family.

FOCUS SESSIONS 3:30–4:30 P.M.

Client Strategies

Presented in Cantonese

The Sales Cycle

Joyce Wu Shuk Ping / Orange County Convention Center / S330 E

Take a tour of the sales cycle, from the first steps of prospecting and fact-finding to the presentation itself to the final steps of closing and after-sales service. If we are able to do every step of the sales cycle well, and deliver great presentation in each step, we'll create an endless client source, the quality of clients will continue to improve, and in turn our business will grow. This presentation will illustrate every step of the entire sales cycle, make it fun and easy to learn, and help you achieve the best possible success in the business.

FOCUS SESSIONS CONTINUED 3:30 – 4:30 P.M.

Marketing

Presented in Japanese

How to Organize an Insurance Seminar with a Waiting List

Yasuki Tsuruoka / Orange County Convention Center / S320 A

Tsuruoka speaks at seminars across Japan on how to live with money in harmony. Following the seminar, he offers an insurance class that has become so popular through word of mouth, there is now a waiting list. Tsuruoka will discuss how to successfully run events like these yourself. In sharing his best practices, he will leave you engaged and energized.

Marketing

Presented in Korean

The Brand Named "Me"

Hoon Joo / Orange County Convention Center / S320 F

Joo will share how he became irreplaceable to customers through the process of pursuing his own brand. He will cover specific sales methods of pursuing your own brand and discuss strategies that lead to consistent referrals. He will also stress the importance of using networks.

Protection

Presented in Mandarin

Four Seasons of Financial Life

Cheuk Ka (Kathy) Siu / Orange County Convention Center / N320 (overflow in N220)

Just as there are four seasons in nature, there are the same seasons for human life: sowing in spring, developing in summer, harvesting in fall and storing in winter. With each phase, people have different needs and concerns. In terms of financial life, it's creating, preserving, transferring and enjoying wealth. You will learn how to prepare to live a happy and fulfilling life. The wisdom of wealth preservation and inheritance is very important, especially for high-end clients. Life insurance and family trusts are the important financial vehicles to ensure wealth is handed down generation after generation. Leave this session with the knowledge to take care of your clients.

Protection

Presented in Mandarin

Sell Insurance with Risk-Return Illustrations

Shao-Kai Chiu, CFP / Orange County Convention Center / N310

"Ideas arouse feelings, feelings stimulate actions and actions change results." This is the motto of successful MDRT members. Chiu will tell several stories of actions he has taken that not only enhanced his professional image, but also created more value for his clients. Along with sharing how to present a risk-return illustration, Chiu will discuss why it's important to have a strict adherence to professional ethics, explain the notion of "service first and deal last," and ultimately, improve your closing rate.

Client Strategies

Presented in Thai

The Power of Love

Supaporn Samsittichok / Orange County Convention Center / S330 A

Samsittichok got into the insurance business because of the love she had for her family, who struggled financially and needed her help to ensure a comfortable life. Creating a better life for her family showed her firsthand the payoff that is possible through this business when advisors follow their hearts and do what they know is best. She will share that inspiration in this session, and teach you how to convince your clients to build love for their families through insurance policies.

Top of the Table

Building an Engaged Organization

Jennifer A. Borislow, CLU, and Mark S. Gaunya, GBA / Hilton / Orlando Ballroom IV

Successful agencies understand the importance of employee culture and engagement. Employees need to feel connected to a purpose that is meaningful and actionable. When your employees are engaged, their relationships with clients are stronger, their happiness levels rise and their power to achieve more is realized. It is the key to improved performance and agency growth. Top of the Table members Borislow and Gaunya will share what they have done to implement culture strategies and effective engagement tools to grow their agency, which was recognized by the Boston Business Journal as one of the "Best Places to Work" in Massachusetts.

FOCUS SESSIONS 3:30–5 P.M.

Whole Person

Adapt or Die: A Survival Guide for a Changing World

Joseph W. Jordan / Hilton / Orlando Ballroom III

There is a negative global perception of the financial services profession, as evidenced by recent regulatory actions. Coupled with the rise in technology and robo-advisors, some are now questioning the viability of the industry. Jordan will teach you how to thrive in this hostile environment. He will share why a transformational culture change is necessary to refocus our business purpose on making sure the money outlives the people and provides independence and dignity to an aging population. He will cover three major issues that all financial services professionals face:

- How to increase per rep productivity
- How to sell the right mix of business based on clients' needs
- How to build a culture based on value not price

FOCUS SESSIONS CONTINUED 3:30 – 5 P.M.

Client Strategies
Hindi
Portuguese
Spanish

The Power of Words

Bhupinder S. Anand, ACII, Dip PFS / Hilton / Orange Ballroom DE

In his 2016 Main Platform presentation, Anand explained the need to consider carefully the words we use, the reaction they create, the response they generate and the results they deliver. This session explores this theme in greater depth, and you will gain a better understanding of why language is so important. Words need to create the right emotions with clients for them to make sensible decisions, and a command of creative language empowers you to be different from your competitors. By analyzing the words we use, we have the ability to quickly and significantly influence a client relationship and in this session you will learn many creative ideas you can use immediately that can accelerate you to Top of the Table level.

Protection
Bahasa Indonesia
Vietnamese

Business-Owner Marketplace Made Easy

Jeffrey M. Wadsworth, MBA, CFP / Hilton / Orlando Ballroom I

Learn how to confidently ask for USD 10,000, USD 50,000 and USD 100,000 life insurance premiums in an easy and effective manner. Wadsworth shares powerful sales concepts within the context of an inspirational story about the tragic death of one of his best clients. Leave this dynamic presentation with many powerful ideas you can use the minute you get back home to help you achieve Court of the Table and Top of the Table-level production.

Retirement/ Wealth Planning Strategies

Retirement and Wealth Planning Strategies and Skills

Stanislaus Benjamin / Hilton / Orlando Ballroom II

Retirement is no longer an entitlement in many countries and has become a privilege only for a few. The average life expectancy is increasing, and many countries are changing pension and welfare systems, impacting retirement plans of people across the world. This session will provide you with the right retirement and wealth planning strategies to meet the financial challenges that your clients may face in the years ahead. You will learn about changes and challenges in the world that will impact your clients retirement choices, and how you can help clients avoid financial disasters from affecting their retirement plans and goals. You will also learn how to create a simple retirement and wealth action plan for clients to implement immediately.

Marketing
Cantonese
Japanese
Korean
Thai

Everybody Knows Joe: 11 Keys to Impactful Networking

Joseph M. Thomas / Orange County Convention Center / S310

Would you like to feel more confident when you go to a networking event? Do you wonder how other advisors get so many quality appointments and never cold call? Thomas shares how to attend the right events and land meetings with your ideal prospects. This includes a discussion of the variety of networking events out there and how to utilize the connections made in these settings. Every time you introduce yourself to a new person, you have the potential to make a contact. Leave this session with the ability to make the most of those opportunities.

Protection

Presented in Spanish

Strategic Advantages to Stocks and Trust Funds

Jose Trinidad Nunez Orozco, LUTCF, FSS / Hilton / Orlando Ballroom V-VI

Learn a program that guarantees the well-being of both your clients and their families in case any of the partners dies or becomes disabled. The means is an agreement protected by a trust fund foundation and financed by life insurance. The surviving partners increase their shares pursuant to the agreement, while the family of the deceased sells the stock. Beyond the strategic planning advantages, Orozco will also explain other fiscal advantages this plan can provide.

Practice Management

Presented in Hindi

Wealth Management: The Journey from Insurance Agent to Portfolio Advisor

Aman Chugh / Orange County Convention Center / S331

While insurance is an important way for clients to manage risk, it can also be seen for its role among the client's investments. Chugh discusses why advisors should seek to understand all elements of the client's financial portfolio to appropriately position insurance products as a risk mitigator and investment. He also addresses the trade-off between the risk and return of insurance products and analyzes practices within the mutual funds market. With this extensive knowledge, Chugh suggests advisors can stand out from the competition and provide stronger value for their clients.

5 – 6 p.m.

Quarter Century Club

Quarter Century Club members only

Hyatt / Orlando Ballroom

5:30 – 6:30 p.m.

Top of the Table Reception

2017 Top of the Table members only

Hyatt / Plaza International Ballroom DEF

WEDNESDAY, JUNE 7

7 a.m. – 2 p.m.

Registration

Orange County Convention Center / South Hall B

7 a.m. – 6 p.m.

Interpretation Headset returns

Orange County Convention Center / South Hall B

8:30 – 9:30 a.m.

Cornerstone Presentations

Japanese
Korean

Raising Execution Through Reclaiming White Space

Juliet Funt / Presider: Regina Bedoya, CLU, ChFC

Hilton / Orange Ballroom DE

Every entrepreneur has only a select handful of true priorities – and they'll do anything to move them forward. But when talented folks are lost in unnecessary emails, meetings, paperwork and other low-value tasks, they crawl toward these pivotal objectives. In this high-energy session, you will learn cutting-edge tactics that combat this draining scenario, and you'll begin to understand the critical difference between activity and true productivity. You will also learn how to create more white space and improve your creativity, strategy and thoughtfulness.

Cantonese

A Mind Opened by Wonder

Vinh Giang / Presider: Ross Vanderwolf, CFP

Hilton / Orlando Ballroom I

Mindset is everything. Imagine for a moment that you "got up on the right side of the bed" every single day for the next three months. How would that change your life? How would that change your business? In this extension of his Main Platform presentation, Giang will take you behind the scenes to show how magicians are able to influence their spectators, and demonstrate techniques to block out negative influences and maintain a positive mind set. Through several powerful exercises, he shows how to break down the barriers that we have in our minds. As cliché as it may seem, Giang will demonstrate right before your very eyes that anything is indeed possible.

Bahasa Indonesia
Cantonese
Hindi
Japanese
Korean
Mandarin
Portuguese
Spanish
Thai
Vietnamese

A Journey To Success

Tony Gordon and Alessandro M. Forte, Dip PFS

Presider: James D. Pittman, CLU, CFP

Orange County Convention Center / South Hall A

Enjoy this conversation between friends and longtime Top of the Table members Gordon and Forte as they reflect on their journeys to success. Find out how they overcame their challenges and learn the ideas that took them from humble beginnings to a combined 59 years of Top of the Table qualifications.

Mandarin
Spanish

Become the Obvious Choice

Peter Sheahan / Presider: Mark J. Hanna, CLU, ChFC

Orange County Convention Center / S310

Sheahan will take you on a deep dive into how great leaders find opportunities in the face of disruption and take advantage of change to create more value. In this interactive, case study-rich session, he will unpack for you the answers to the following questions:

- What constitutes value in the mind of your most important clients?
- Where are opportunities to create more value found?
- What key attributes are needed to differentiate yourself and offer a valuable and profitable point-of-difference in your practice?
- How can you find and exploit those opportunities, even as the market changes and disruption continues?

Sheahan will lead you through a tactical approach that will leave you with increased clarity on how to develop the tools to bring your vision into reality. Come find the inspiration.

9:30 – 10:30 a.m.

Quarter Century Club

Quarter Century Club members only

Hyatt / Orlando Ballroom

9:30 a.m. – 5:30 p.m.

MDRT Store

Orange County Convention Center / South Hall B

9:30 a.m. – 5:30 p.m.

MDRT Foundation Booth

Orange County Convention Center / South Concourse / Level II

10 – 11 a.m.

Presented in

- Cantonese
- English
- Japanese
- Korean
- Mandarin
- Spanish
- Thai

Court of the Table Open Forum

Hilton / Orange Ballroom B

This event is for 2017 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.

FOCUS SESSIONS AND ECHO SESSIONS

10–11 A.M.

Echo Sessions

Engaging, conversational-style sessions led by facilitators who share a session's highlights and takeaways, and lead the discussion on how to put the information to use for further professional development.

Cantonese

Orange County Convention Center / S330 E

Mandarin

Orange County Convention Center / N320 (overflow in N220)

Hindi

Orange County Convention Center / S331

Spanish

Hilton / Orlando Ballroom V-VI

Korean

Orange County Convention Center / S320 F

Thai

Orange County Convention Center / S330 A

Presented in Japanese

Open Forum Session – Japanese Language

Orange County Convention Center / S320 A

A forum for discussion of timely topics of interest to Japanese members.

Whole Person

Dodging Dodgy People – Save Your Time, Money and Heartache

Janet Hall, Ph.D. / Hilton / Orlando Ballroom III

Do you ever wish you had a magic wand to deal with the difficult people in your life? Have you been hurt, betrayed or cheated by a really dodgy person? Perhaps it's a colleague, a business partner or a client. Or maybe it was your boss or your spouse. In this session, you will discover powerful new skills that allow you to identify the people you can trust. Hall, a clinical psychologist, will provide examples of bullying, harassment, sabotage, petty politics and costly relationship breakups in business and at home. She calls upon decades of practice and observation to offer proven strategies for avoiding toxic relationships.

FOCUS SESSIONS AND ECHO SESSIONS CONTINUED 10 – 11 A.M.

Client Strategies
Portuguese
Spanish

The 21st Century Advisor

Sanjay Tolani, FLMI, MBA / Hilton / Orange Ballroom DE

Advisors today need to present complex solutions to appease the multifaceted financial goals of knowledgeable and demanding clients. Tolani explains how combining existing knowledge with new information can lead to high income. He addresses building a universal presentation, handling objections and concerns, and how to answer the question, "Why should I choose you as my advisor?"

Protection

Hanna's Letter to Santa and Other Great Conversations about Critical Illness Insurance

Darren W. Ulmer, CFP, CHS / Hilton / Orlando Ballroom II

Gain a new perspective on the benefits of critical illness insurance through the experiences of Ulmer, a cancer survivor, and his 8-year-old daughter, Hanna. Ulmer stresses the importance of living benefits coverage and addresses how critical illness impacts not only the patient but the entire family. In addition to telling his own story through a letter written by his daughter, he recommends a variety of conversations to have with clients about critical illness insurance and how it helped his family focus on recovery rather than financial concerns.

Marketing
Bahasa Indonesia
Hindi
Vietnamese

Telephone Tango: Getting Appointments in a No-Pick-Up Culture

Gail B. Goodman / Hilton / Orlando Ballroom I

Technology has changed how we prospect and set appointments with both old and new clients. Goodman will teach up-to-date behaviors that increase your chances of actually speaking to a new prospect and having an opportunity to schedule that vital initial appointment. Keeping in touch with clients has also become more challenging, and the ideas presented in the session will address this challenge and show you how to use technology to your advantage.

Practice Management

How the DOL Has Already Affected You, and Other Legislative Updates

Judi Carsrud / Hilton / Orlando Ballroom IV

Understanding the DOL's final rule on fiduciary advice for retirement savers will be essential for those working with plan sponsors, plan participants and IRA holders. Carsrud, director of federal relations with NAIFA, will explain the rule and what exemptions are available for different compensation arrangements. After this session, you will know when you are providing fiduciary advice and which compensation arrangements are prohibited. You will also learn how to organize client databases and recordkeeping to protect against frivolous complaints. Carsrud will also discuss what changes to expect as the marketplace adjusts to this very complicated rule. *This is a repeat session from Monday, 3:30 p.m.*

Marketing

Presented in Mandarin

Reach MDRT Through Conceptual Marketing

Joseph Fang / Orange County Convention Center / N310

Fang will explain how to use conceptual marketing and speak the "right-brain language" to increase your production. To improve sales results, you must start by asking good questions to open the clients' hearts. Fang will teach you how to use metaphors and stories to discuss insurance issues with clients and connect with their imagination, emotions and dreams. Examples include undertaking surgery, riding in an elevator, viewing Picasso's paintings, playing golf and driving a car.

Top of the Table

Cantonese

Japanese

Korean

Thai

Seminars: Your Entryway to Court and Top of the Table

James William Johnson / Orange County Convention Center / S310

To survive and thrive in the financial services business, you must always be marketing. Seminars are an excellent way to do that. They come in many shapes and sizes, from dinners to professional group presentations to simple two-minute elevator speeches. Johnson will cover some of the do's and don'ts of seminars and share a 30-minute presentation you could easily tweak to suit your business.

FOCUS SESSIONS

11:30 A.M.– 12:30 P.M.

Client Strategies

Cantonese

Japanese

Korean

Thai

Process

Bruce W. Etherington, CLU, CH.F.C. / Orange County Convention Center / S310

Etherington will review his process for prospecting, fact-finding, selling and serving clients which has garnered him 40 Top of the Table qualifications – making him one of only 12 people in the world with that distinction. He will share simple transferable ideas, strategies and tactics that have worked for him for more than 50 years, and can work for others. His process will enable you to dramatically grow your business and achieve results that aren't limited to personality and persuasion skills.

FOCUS SESSIONS AND ECHO SESSIONS CONTINUED 11:30 A.M.–12:30 P.M.

Protection

Bahasa Indonesia

Hindi

Vietnamese

Disability Insurance: How To Sell, and Why They Buy!

Corry Collins, CLU, CH.F.C. / Hilton / Orlando Ballroom I

This session will teach you how to understand disability insurance so you can explain it – and sell it – to professionals. Collins will share how he tracks his clients and why they keep buying more disability insurance coverage. He will discuss his 12-point comparison of personal disability versus group disability, as well as the seven different ways to claim in a professional policy.

Retirement/ Wealth Planning Strategies

Strategic Retirement Planning: An Integrated Approach

Michael J. McNeil, CLU, ChFC / Hilton / Orlando Ballroom III

McNeil will demonstrate how to provide a secure and tax-efficient retirement outcome for your clients with an integrated process that combines the benefits of permanent life insurance, long-term care planning and deferred income annuities. Each of these three tools alone can be valuable, yet when combined in one comprehensive plan, the benefits are greater than the sum of their parts and your clients will be yours for life. McNeil will demonstrate how, by using an integrated plan, a client is able to:

› Hedge their portfolio's risk
› Protect their assets from inappropriate retirement decisions
› Address a desire for leaving an intact financial legacy
› Ensure a predictable retirement outcome regardless of economic or personal conditions

Marketing

Portuguese

Spanish

Selling Success All Over the World

Gregory Pogonowski, Dip PFS, Cert CII(MP) / Hilton / Orange Ballroom DE

Is it possible to move across the globe and still maintain high production? Can you know what your client is thinking and utilize that knowledge to benefit you both? Pogonowski will share sales ideas and strategies gained from more than 30 years as a financial professional, with experience ranging from the highly regulated UK market to Dubai, where there are no tax advantages for any products. He also will detail lessons which helped triple his production and led him to speak at conferences across Europe. You will learn how to apply your skills to a diverse range of clients as Pogonowski offers a 90-day challenge to help reach Court of the Table then Top of the Table-level production.

Practice Management

The Great Transition

Angus Donald McQueen, Dip FS, Dip CD / Hilton / Orlando Ballroom IV

When regulations force you to change your business, how do you react? Changing your income model to fees may seem daunting, but, if done correctly, you can actually focus on your ideal clients: those who love you, are prepared to pay you and help you thrive. Finding ideal clients is a balance between great service and great relationships. A wealth management specialist, McQueen will describe the regulations which forced many advisors to change their income model to fees. With some of the tips he learned through his own transition, he will show you how you too can build a more precise offer and attract the right people. He will take you on your own thought-provoking discovery of what to do to grow and improve quite easily.

Practice Management

Presented in Cantonese

Effective Self-Management

Terence Chan Mou Hon / Orange County Convention Center / S330 E

As financial advisors, we need to face different types of people, handle multiple tasks and deal with varied emotions on a daily basis. Dealing with all of that is no easy task, and many agents lack effective tools to manage their work and have a successful life. Chan Mou Hon will show you how to create an easy-to-use self-management manual that will help you achieve your goals and attain peace of mind.

Protection

Presented in Japanese

Determination Makes Me Stronger

Naoki Noda / Orange County Convention Center / S320 A

Through the challenging experience of dealing with a family tragedy while he was in college and receiving a death claim, Noda discovered firsthand the value of an insurance policy to a family who loses their sole breadwinner, and the difference it made in his family's life. This experience drives his firm commitment to his clients as an advisor today. Learn from his expertise in selling protection, even in the historically low-interest-rate environment. It all begins with the mindset.

FOCUS SESSIONS AND ECHO SESSIONS CONTINUED 11:30 A.M.–12:30 P.M.

Retirement/ Wealth Planning Strategies

Presented in Korean

Another Companion for You: Self-Asset Management

Hang Jun Cho / Orange County Convention Center / S320 F

Self-asset management is a program designed to establish goals for a beautiful and happy life through the core concept of "I am the protagonist in my life." In connection with areas people find difficult, including insurance, investments, taxes and legal affairs, this session will teach you to help your clients make decisions on life planning based on their direction in life, and align your perspective with customers' concerning income and financial matters. Advisors' careers grow when their customers achieve success and happiness in life. Leave this session with the skills to pursue mutual growth through companionship with clients.

Retirement/ Wealth Planning Strategies

Presented in Mandarin

How to Talk About Life Insurance with Entrepreneurs

Wei Feng / Orange County Convention Center / N320 (overflow in N220)

Entrepreneurs account for 80 percent of the high-net-value population in China. Feng will focus on the relationship between risk management and insurance. She'll analyze the risks most entrepreneurs are facing from different perspectives, introduce a solution for each risk, and discuss the advantages and disadvantages of each solution. Among those solutions, insurance, as a financial instrument, plays an essential role.

Client Strategies

Presented in Mandarin

The Key Component

Shao-yi Ni / Orange County Convention Center / N310

The right temperature is a key to a perfect cup of coffee. Similarly, in the world of financial advice, quality service is the most important component to selling an insurance policy. Ni will illustrate best practices in fact-finding and client conversations that will improve your personal service, elevate your selling process and lead you to more referrals.

Client Strategies

Presented in Spanish

The 7 Ideas That Changed My Business

Rodrigo Rivera Barba / Hilton / Orlando Ballroom V-VI

Barba will discuss seven essential concepts that have bolstered his business and propelled him to Court of the Table production. You will be able to apply Barba's ideas to your business to boost your sales, get more referrals, close the sale, assess the emotional cost of your outcome and more.

Top of the Table

Presented in Hindi

How to Reach the Top of the Table and Stay There

Radhakrishna K. Shetty, LUTCF / Orange County Convention Center / S331

It is a major achievement to qualify for MDRT's Top of the Table. It is an even bigger one to stay there. Shetty will show you how you can do both. By focusing on being an advisor and not just a salesman, you can convert individual excellence into institutional excellence. Shetty will explain how he has earned 12 consecutive Top of the Table honors and, in the process, show you how to improve your communication and increase your sales.

Client Strategies

Presented in Thai

Sales Techniques and Staying Motivated

Sangkhet Tichavanich / Orange County Convention Center / S330 A

Tichavanich believes, with the right training and techniques, every financial advisor can be successful selling life insurance. Attend this session to learn how to find new prospects, open their minds and close the deal.

Practice Management

Fee-Based Practices – A Panel Discussion

Kenneth E. Davy, Cert PFS, FCII; Gregory B. Gagne, ChFC;
Gino Saggiomo, CFP; Caroline A. Banks, FPFS (Moderator) /
Hilton / Orlando Ballroom II

Regulations around the world have left many advisors with no other option than switching from a commission-based business model to one that centers around fees. Other advisors have made the switch voluntarily when they saw the benefits. A panel of industry veterans who have successfully incorporated fees into their businesses will discuss the challenges and rewards of the switch from the perspective of both the advisor and the client. Among the questions the panel will address:

› How do you properly value your advice?
› Do you base your fees on time spent, value added or a combination of the two?
› Do you pick a "line in the sand" date to transition clients to the model, or is there a transition period?

You will leave this session with proven ways to convince clients that paying for advice is best for them, tips for compliance, confidence in your ability to transition your practice and excitement about the opportunities ahead.

2 – 5 p.m.

Main Platform

Orange County Convention Center / South Hall A

(doors open at 1:15 p.m., live music begins at 1:30 p.m.)

Presiders	Regina Bedoya, CLU, ChFC, and Mark J. Hanna, CLU, ChFC
The Art of Enchantment	Guy Kawasaki
The Best Thing	Ian Green, Dip PFS
Keep Hitting the Rock	Billy Riggs
Doing Stress Well	Kelly McGonigal
Break	
Ask, Think, Do, Repeat	Jeff Havens
Creating Unexpected Moments of Joy	Charlie Todd
Moving to Great	Eric Boles

Small stars shine the brightest

Give Kids the World Village is a whimsical, 79-acre, nonprofit resort that provides weeklong getaways for children with life-threatening illnesses and their families.

Support our partnership with Give Kids the World Village with a donation to create a S.T.A.R. moment for these families – something they'll always remember. Each donation is divided evenly to support Give Kids the World Village and the MDRT Foundation's global grant programs.

MDRT FOUNDATION | MDRT® | Give Kids The World Village® Where Happiness Inspires Hope

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SPEAKERS

Alvaro Aldrete Morfin II, CLU, FSS, is a 10-year MDRT member with two Court of the Table and three Top of the Table qualifications. A professional speaker in the Allenamenti Speakers Bureau and member of Toastmasters, Morfin has presented at several MDRT meetings, including the last three Annual Meetings. Sharing via presentations on insurance and non-insurance topics is his passion, and he desires to share the best practices he has applied in his career with colleagues and friends.

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Bhupinder S. Anand, ACII, Dip PFS, is a 21-year MDRT member with four Court of the Table and 16 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 and is author of the motivational book "Smashing the Glass Ceiling."

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Brian H. Ashe, CLU, is a 46-year MDRT member with 16 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, CFP, of Irvine, California, is a 47-year MDRT member with 39 Top of the Table honors and a past President of MDRT. Baker is an Excalibur Knight of the MDRT Foundation and served as its President in 2000. He served as a board member of AALU and is a past president of the Orange County Association of Insurance and Financial Advisors. Baker has frequently presented at the MDRT Annual Meeting and Top of the Table Annual Meeting, has written several books and hundreds of articles for industry publications, and was recognized by *Worth* as one of the top 250 advisors in America. Baker is completing a Ph.D. in retirement planning and investments through the American College.

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Caroline A. Banks, FPFS, is a 28-year MDRT member with 23 Top of the Table honors who served as President in 2015. 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 one of a handful to be selected for each of the past 5 years inclusion in Citywire's Top 100 Advisers, 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).

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Chris Bashinelli, the cross-cultural explorer, was born and raised in Brooklyn, New York. After a decade-long acting career, he decided to follow his real passion – using media to bridge intercultural gaps worldwide – so he traveled to East Africa. He now traverses the globe from Uganda to Mongolia as host of Bridge the Gap, a TV series featured on PBS and the National Geographic Channel, where he discovers what it's like to walk in someone else's shoes for one day. He is a United Nations emcee, a National Geographic Explorer, an Eagle Scout, and a writer for award-winning publications like Lonely Planet.

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David Batchelor, Dip PFS, CFP, is a 20-year MDRT member with two Court of the Table and 18 Top of the Table honors. He was a founding director of the Personal Finance Society in the United Kingdom (UK) and currently serves as UK coach for The Strategic Coach program. He has worked with more than 100 entrepreneurs to improve their businesses.

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Stanislaus (Stanis) Benjamin is the author of "Sales Prospecting Strategies and Skills." He started his career as an agent with AIA Singapore, and is the founder of the Centre for Communication and Sales Training. He has been coaching sales teams from the financial services sector for more than 25 years. He is currently writing a book and has developed a card game on retirement and wealth planning strategies which will be published next year.

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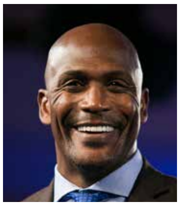

Eric Boles is the president of The Game Changers, Inc. Through a combination of coaching, consulting, and training, he helps organizations collapse time, achieve goals quickly and function within their purpose and values. The results organizations experience are real and powerful. A highly acclaimed keynote speaker, Boles presents his inspiring and challenging insights and strategies to thousands of leaders each year. His expertise on leadership, culture change, team dynamics, and peak performance has been shared with clients such as Hasbro, Kraft Foods, New York Life, National Association of Realtors, and Swiss Re. Prior to becoming a high performance authority, Boles learned many principles of team dynamics and leadership from his experience playing in the National Football League.

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Jennifer A. Borislow, CLU, is a Past President of MDRT and the founding principal of Borislow Insurance (BI). A 29-year MDRT member with one Court of the Table and 19 Top of the Table honors, she is a nationally recognized expert, author, speaker and thought leader on employee benefits, insurance and related business strategies. As the CEO and strategic coach of the organization, Borislow focuses her energy on helping the agency create a unique experience for clients. For more than 34 years, Borislow has helped business owners and executives develop a clear, forward looking strategic vision for their organizations that leverages employee benefits, risk management and much more.

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Brad Brain, CFP, CLU, is an eight-year MDRT member with five Court of the Table honors and has 21 years of experience as a practicing financial planner. He is committed to helping clients build multi-generational wealth through a prudent and disciplined approach to wealth creation and preservation. He has helped to author the Certified Financial Planner exam, and is a nationally recognized thought leader in the field of retirement income planning.

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Jenny Brown, CFP, FChFP, is a nine-year MDRT member with two Court of the Table and three Top of the Table honors. She is the founder and CEO of JBS Financial Strategists and was named the 2013 Association of Financial Advisers (AFA) Financial Adviser of the Year. She has more than 25 years' experience in the financial planning industry and has a passion for improving the professionalism and reputation of the industry and those within it. She has served as an Area Chair for the MDRT Member Communication Committee.

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Karyn Buxman, CSP, CPAE, is an international speaker, author, and neurohumorist. A pioneer in her field, Buxman shows audiences how to build resilience, enhance communication and boost engagement through humor. She is one of 175 professionals (and one of only 39 women) in the world to be inducted into the National Speaker's Association's Speaker Hall of Fame. Buxman wows audiences with her high content and high energy – but is serious about humor.

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Peter Jason Byrne, of Coorparoo, Queensland, Australia, is a nine-year MDRT member with four Court of the Table and two Top of The Table honors. Byrne leads the Mr Insurance team and has more than 15 years' experience finding the right insurance solutions for families and their businesses. The growth of success and expansion in the insurance industry has helped Byrne build a respected reputation as an industry leader in this field. Byrne is also a member of the AFA (Association of Financial Advisers).

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Judi Carsrud, director of federal relations with NAIFA, meets with members of Congress, regulatory agencies and industry association partners to advocate for a positive legislative and regulatory environment. Her primary advocacy areas include tax and ERISA issues relative to insurance industry products and retirement savings plans. Carsrud has spearheaded NAIFA's national advocacy efforts regarding the Department of Labor's (DOL) fiduciary rule. She held meetings with White House officials, the DOL, FINRA and the SEC.

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Dr. Caroline Casey is both an adventurer and business woman whose passion and ambition for leading a life without limits and labels is truly contagious. An advisor, mentor, board member and international speaker, Casey has a real ability to connect with people. Since making a life-changing decision at 28 to leave her successful career as a management consultant and travel across India on an elephant, she has been recognized for her pioneering and innovative approach to changing attitudes and perceptions of disability focusing on business and media. Despite being the recipient of many awards and accolades, Casey believes that true success only comes to those who never give up, and always endeavor to truly be themselves, something even she is still working on.

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Louis J. Cassara, CLU, ChFC, president and CEO of The Cassara Clinic and The Financial Resource Network, has been inspiring people to realize their true potential for more than 33 years. Cassara's impressive career as a Chartered Financial Consultant and Chartered Life Underwriter has placed him in the top 1 percent of his peers. He is a 34-year MDRT member and a 21-time Top of the Table qualifier. His career accomplishments include more than USD 2 billion of life insurance in force, USD 40 million of life premium and 3,000 lives. Cassara is a nationally recognized teacher, speaker and author on communications and client relationships.

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Hung Chan is an 11-year MDRT member with one Court of the Table qualification who has served on the Member Communication Committee for the past two years, first as a Local Chair then as an Area Chair.

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Terence Chan Mou Hon is a 10-year MDRT member who has nearly two decades worth of experience in the financial services business. He currently serves as a Zone Chair for the Member Communication Committee.

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Neeraj Chauhan, CFP, BCom, is a 13-year MDRT member with more than two decades of experience helping families achieve their financial goals. Using a unique blend of skills, knowledge and experience, Chauhan tackles behavioral issues that hinder wealth creation to help clients take better control of money and responsibility for their financial future. He currently serves as director at The Financial Mall and is regularly invited to contribute to business related shows and publications in India. He has served on numerous MDRT committees and is currently the Area Chair for Zone 4.

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Eunice Chen is 22-year MDRT member with six Court of the Table qualifications and one Top of the Table honor who has spoken at multiple MDRT Annuals Meetings. She was Chair of the 2015 Whole Person Committee and has served on numerous other committees. She is the author of several books, including her most recent title, "Value."

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Shao-Kai Chiu, CFP, is a five-year MDRT member with three Top of the Table honors. After nearly a decade in the industry, he is now first vice president of Cathay Life Agent Summit.

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Hang Jun Cho is a lecturer for Phoenix Sales Seminar and Core Sales Seminar. He is the CEO and master lecturer of Phoenix Asset Investment Management.

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Natthamon Chotthamrongsin is a four-year MDRT member with one Court of the Table and two Top of the Table honors. Since starting in the business, she has achieved top sales of the year for AIA Thailand in each year.

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Aman Chugh is a chartered accountant who specializes in investment banking, corporate banking, international financial markets/instruments, derivatives and risk management. He works with numerous Fortune 500 companies, regulatory bodies and associations and has served in management roles with well-known brands including Pricewaterhouse Coopers, Ernst & Young and General Electric.

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Adelia C. Chung, CLU, ChFC, is a 35-year MDRT member with eight Court of the Table and 13 Top of the Table qualifications. She was the first female MDRT President, serving in 2005, and has been a Chair or member of more than 20 MDRT committees. She is an Excalibur Knight of the MDRT Foundation and served as its President in 1999. The owner of Spectrum Wealth Management in Honolulu, Hawaii, Chung has held many positions of leadership throughout the life insurance business, and she regularly speaks to international audiences.

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Corry Collins, CLU, CH.F.C., is a 16-year MDRT member whose practice focuses on physicians. Collins has a broad knowledge of living benefits including disability, critical illness insurance and life insurance. Collins has chaired many MDRT committees, spoken in 10 countries and authored two books.

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Matthew Charles Collins of Mona Vale, New South Wales, Australia, is a 14-year MDRT member with two Top of the Table honors. He joined the financial services industry in 1998 working with his father, insurance industry icon Russell Collins, later buying Russell's business and successfully merging it with his own. He spoke at the 2009 Annual Meeting and the 2016 Experience and Global Conference in Hong Kong. As an MDRT volunteer, he has served on several MDRT committees. Collins has also won multiple championships in the surf boat rowing, an iconic Australian sport involving five-man boat crews competing in Australia, South Africa, France, the USA and the United Kingdom.

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Richard Pearse Collins is a four-year MDRT member with four Top of the Table honors. Though he never had aspirations to be a financial advisor, Collins reluctantly worked as an auditor and management accountant before moving into asset management and global prime commercial real estate acquisition. After the 2008 global financial crisis, he decided to buck trends and set up a finance firm in the middle of the worst financial crisis in decades. He is now CEO of the Walfrid Private Group, a financial planning firm serving high-net-worth clients which specializes in executive and corporate financial planning. Outside of Walfrid Private, Collins places a huge emphasis on family and charity.

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Kenneth E. Davy, Cert PFS, FCII, is a 46-year MDRT member. He is currently chairman and founder of the SimplyBiz Group which provides compliance and business support services to more than 6,000 financial advisors in the U.K. A prolific producer he holds the distinction of being the U.K.'s longest-serving MDRT member, Davy has been a regular industry speaker throughout his career and received numerous national, community and financial services awards. He is a past president of the Life Insurance Association (LIA) and a founding director of both IFA Promotion and the Association for Independent Financial Advisers. Davy has been active in community and charitable activities and is chairman of the Huddersfield Giants professional rugby club.

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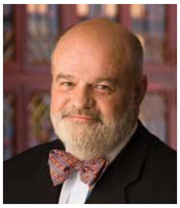

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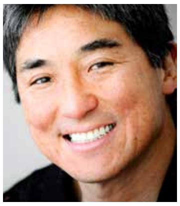

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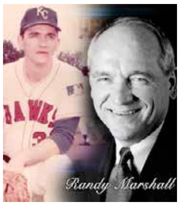

Randy Marshall, Ph.D., has been involved in the communications arena for more than 35 years as a speaker, communications professor and corporate consultant. He founded and currently leads Speaker's College, a Dallas-based communications training company formed to improve the communication and leadership skills of executives. He has trained corporate managers and sales personnel from New York Life, Smith Barney, American Express, Prudential and others. Marshall earned both a B.A. and M.A. in communications from the University of Arkansas, where he was selected as a Rhodes Scholar nominee. He played baseball professionally for the Kansas City Royals.

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Michael J. McNeil, CLU, ChFC, is a 39-year MDRT member with 10 Court of the Table and two Top of the Table honors. A wealth management advisor with a general practice involving both risk-based planning and investment management, he focuses on retirement and estate planning for professionals and family businesses. With 40 years in the business, McNeil has consciously sought to help design plans that address multiple risks of investing, tax exposure and intergenerational concerns within families. Since venturing into the long-term care planning arena almost 19 years ago, McNeil has trained other advisors and spoken publicly on how it is a key component of an integrated retirement plan.

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Bryson Milley, CFP, CIM, began his career in 1995 as an agent of a large Canadian life insurer. He ventured out on his own three years later as an independent financial advisor, eventually joining forces with Rogers Group Financial in 2003. Milley's practice focuses on an integrated wealth management process largely directed to professionals, self-employed individuals and small-business owners. Milley is a 16-year MDRT member with six Court of the Table and two Top of the Table qualifications, and has attended more than 12 Annual Meetings.

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Shao-yi Ni is a five-year MDRT member who represents Taiwan as a Local Chair in the Member Communication Committee. He has used the demand-oriented marketing model to successfully assist many of his clients to plan for their retirement. His image-based medical umbrella marketing concept became a central part of his company's internal training materials.

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Gregory Pogonowski, Dip PFS, Cert CII(MP), is a 24-year MDRT member with 12 Court of the Table and 11 Top of the Table honors who has served on multiple committees within the organization. Pogonowski started in 1984 as a life underwriter with Imperial Life of Canada (now Lincoln Financial). After buying an existing brokerage in 1989, he became an independent financial advisor and has been ever since. He decided to move to Dubai in 2006 to service his expanding international clientele. With more than 200 nationalities in his city, he adapts to different cultures when looking after his expat clients. Pogonowski is a Distinguished Toastmaster, the highest award given by Toastmasters International.

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Billy Riggs, CSP, has been recognized as one of America's Top Five Most Entertaining Speakers and in 2002 earned the highest award of the National Speakers Association, the Certified Speaking Professional designation. Through television, radio, books, videos, and live keynote speeches, Riggs has used an unusual blend of comedy, music, magic, training and motivation to spread his positive attitude to more than a million people on five continents. He uses his illusions and comedy to grip audiences, move them to action, improve attitudes, turbocharge service and sales, and change lives.

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Gino Saggiomo, CFP, is a 10-year MDRT member with six Court of the Table qualifications. By employing practical strategies to fully understand what behaviors are driving financial outcomes, Saggiomo has succeeded in helping everyone from mom-and-dad investors to company CEOs dictate terms to their own finances. As an early adopter of a fee-for-service model, Saggiomo has helped his clients achieve what they previously thought was impossible. He currently sits on two separate industry committees, talking about the issue of implementing fee-for-service methodology into everyday practice. He has served on several MDRT committees.

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Jeffrey Scott, CFP, ChFC, has worked for 25 years in the insurance industry. He is a regular media commentator on the topics of insurance, superannuation, pensions and finance, and has lectured about financial planning at the University of Technology, Sydney and about taxation at the University of New South Wales. He created the first terminal illness benefit for life insurance products in Australia, helped develop lump sum income protection benefits and introduced full income replacement coverage. Scott is currently completing his Ph.D. in taxation and business law.

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Debra Searle has launched three companies, won World Championship medals for Great Britain, presented more than 40 programs for the BBC and become the youngest ever trustee of The Duke of Edinburgh's Award. In 2002, Queen Elizabeth II awarded Searle an MBE for her achievements, and in 2014 Searle was appointed Member of the Royal Victorian Order (MVO) for her work with the Duke of Edinburgh's Award. Searle also runs a diversity training and consultancy business and is passionate about helping organizations maximize the opportunities present in a diverse workforce and customer base.

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Peter Sheahan, the founder and CEO of Karrikins Group, is known internationally for his innovative business thinking and thought leadership. With staff in more than 23 cities across seven countries, he knows firsthand the challenges of growing a business in these rapidly changing times. Sheahan has advised leaders from companies as diverse as Apple, Goldman Sachs, Hyundai, Pfizer and Wells Fargo. He is the author of seven international titles and has delivered more than 2,500 presentations to people in 20 different countries. He has been named one of the 25 most influential speakers in the world by the National Speakers Association and is the youngest person ever to be inducted into their industry Hall of Fame.

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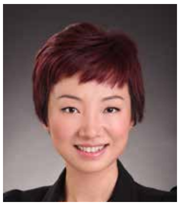

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Through hands-on learning and live demos, go-to experts will answer a multitude of tech questions and offer practical technology solutions for practice management and productivity, social media, devices, travel and myriad other interests.

INSURANCE IN ACTION

Speakers will share stories about the impact their work as insurance professionals has had on their clients.

Sunday, June 4
3–3:20 p.m.

Miki Nagumo, TLC / Japanese

Kinson Ng Chi Lap / Cantonese

Hyoun Pio Park / Korean

Monday, June 5
3:30–3:50 p.m.

Ting Ting Zhang / Mandarin

Brent Kimball, CFP, ChFC / English

Krits Pitimana-Aree / Thai

4–4:20 p.m.

Maurizio Zolezzi / Spanish

Tuesday, June 6
3:30–3:50 p.m.

Marvin Feldman, CLU, ChFC / English

NEW THIS YEAR

MEET YOUR MEETING SESSIONS

Hear tips to navigate the meeting from experienced attendees. Sessions will answer some of the most common questions about the meeting and provide helpful information to help you get the most out of your meeting.

Sunday, June 4
12–12:20 p.m.

Pornprapa Sukreepirom / Thai

Jennifer Mann, MBA, CFP / English

Tamami Okuyama / Japanese

Feng-Chiao Hsu / Mandarin

2–2:20 p.m.

Claudio Sraer, MBA / Spanish

Leung Mo Ling Annie / Cantonese

Jaeseok Park / Korean

Jennifer Mann, MBA, CFP / English

SUNDAY

Time	Speaker Zone 1	Speaker Zone 2	Speaker Zone 3
10:30 a.m.	COURT OF THE TABLE CONNECT **Judith Criner Marroquin, LUTCF, LCI** Creando una Sociedad de Adultos Mayores Sanos e Independientes (S)	COURT OF THE TABLE CONNECT **Kulinchandra Patel** Enjoying "No" (H)	COURT OF THE TABLE CONNECT **Theodore Rusinoff, CFP** The 3 Questions That You Ask Every Prospect and Client (E)
11 a.m.	COURT OF THE TABLE CONNECT **Michael Bibb, Dip PFS, BA** The Rocky Project–What Will Your Legacy Be? (E)	COURT OF THE TABLE CONNECT **Ng Ka Lee** 首次會面成交的魔法 (C)	
11:30	COURT OF THE TABLE CONNECT **Hyun Sook Lee** 리뷰가 답이다! (K)	COURT OF THE TABLE CONNECT **Simon Gibson, Dip PFS** Client Happiness (E)	COURT OF THE TABLE CONNECT **Aurora Tancock, CFP, FLMI** Building a Referral Based Practice (E)
Noon	MEET YOUR MEETING **Pornprapa Sukreepirom** (T)	MEET YOUR MEETING **Jennifer Mann, MBA, CFP** (E)	MEET YOUR MEETING **Tamami Okuyama** (J)
12:30	**Ana Sofia Rodriguez, MBA** El Valor de la Fundación MDRT (S)	EXHIBITOR **The Bryn Mawr Trust Co. of DE** A Wealth of Possibilities & The Delaware Advantage (E)	EXHIBITOR **First Heartland Capital, Inc.** The Solution That Will Make You a Top of the Table Qualifier (E)
1 p.m.	**Alex Braun** Back to Basics in Prospecting, Obtaining Quality Referrals and Sales Concepts (E)	**Saad Baksh, BSc (Hons)** Building and Sustaining a Successful Multi-line Practice (E)	EXHIBITOR **FutureVault Inc.** Become the Client's Financial Quarterback with a Digital Collaborative Vault (E)
1:30	**Aaron Hammer, LUTCF** Millenials: The Opportunities and The Challenges (E)	EXHIBITOR **Continental Insurance Brokers** Larger than Life – Premium Financing for High Value Life Insurance (E)	**Caio Cunha** Como Medir a Satisfação Financeira de um Aposentado? (P)
2 p.m.	MEET YOUR MEETING **Claudio Sraer, MBA** (S)	MEET YOUR MEETING **Leung Mo Ling Annie** (C)	MEET YOUR MEETING **Jaeseok Park** (K)
2:30	**Jae Lee** Coach Your Clients to Teach Their Children Financial Responsibility Early (E)	EXHIBITOR **Asset Life Settlements, LLC** Life Settlement Brokers vs. Providers: Which One Represents the Seller's Best Interests? (E)	EXHIBITOR **The Taylor Method** How to Sell an Insurance Policy Every Day (E)
3 p.m.	INSURANCE IN ACTION **Miki Nagumo, TLC** (J)	INSURANCE IN ACTION **Kinson Ng Chi Lap** (C)	INSURANCE IN ACTION **Hyoun Pio Park** (E)
3:30	AUTHOR **Michael Morrow, CFP** Strategies to Catapult Prospecting and Client Loyalty (E)	AUTHOR **Jianhong Wei** 营销没有不可能 (M)	AUTHOR **Leonor Amelia Villalobos Bedolla** Inteligencia Financiera, Para Ti y Tus Clientes (S)
4 p.m.			

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SUNDAY

Time	Big Idea Theater	Great Conversations	Technology Zone
10:30 a.m.	COURT OF THE TABLE CONNECT **Shane Westhoelter** Quality Life Planning–Not Just Financial Planning: What Clients Really Want (E)	COURT OF THE TABLE CONNECT **Thomas Levasseur, CLU, CLTC** Effective, Cost Efficient Prospecting (E)	COURT OF THE TABLE CONNECT **William J. Rossi, CFP, ChFC** Tips to Get to the Top (E)
11 a.m.	COURT OF THE TABLE CONNECT **Takahiro Izuki, SLU, IFA** ウェルス・マネジメントの要諦 (J)	COURT OF THE TABLE CONNECT **Judy Byle-Jones, CFP,CIU** Adding Value to Clients Going Through Divorce (E)	COURT OF THE TABLE CONNECT **Shao-Kai Chiu, CFP** 雲端ＢＯＸ視客圖 (M)
11:30	COURT OF THE TABLE CONNECT **Wang Lu** 智慧理财规划幸福人生 (M)	COURT OF THE TABLE CONNECT **Sujitra Ueawongchoetchu** การเป็นที่ปรึกษาทางการเงินมืออาชีพ (T)	COURT OF THE TABLE CONNECT **Heather M. Courneya, CLU, CH.F.C.** The Earlier You Start Saving, the More Comfortably You Will Save (E)
Noon	MEET YOUR MEETING **Feng-Chiao Hsu** (M)	**Bennie Wei Chuan Hoo** Secrets to Get to MDRT Life Member (E)	**Miranda Knight** Make the Most of Your Member Benefits (E)
12:30	**Ralph Antolino, J.D., CLU** How to Conduct Client Meetings via Skype (E)		**Kathryn Furtaw Keuneke, CAE** Resource Zone: MDRT's Multimedia Resources (E)
1 p.m.	EXHIBITOR **Status Factory** How YOU Can Become the Only Possible Choice for Your Customers & Prospects (E)	**Joseph Fang** 15次年會15個創意 (M)	**Hidenorei Miki, TLC** 効果的な地方戦略の実践 (J)
1:30			**Monica Castiglione** Transforma las Redes Sociales En Aliadas De Tu Negocio (S)
2 p.m.	MEET YOUR MEETING **Jennifer Mann, MBA, CFP** (E)	**George Shadie, AEP, CLU** Lessons from Attending Annual Meetings (E)	**Tori Unger** Using the MDRT Member Toolkit (E)
2:30	**Soo Chang Hur** 약관을 활용한 효과적인 CI종신보험 판매 (K)		**DAHLIA +** Technology of the Future, Now: AI On Your Devices (E)
3 p.m.	PANEL **Mario Daher Calderon, LUTCF** **Sergio Puente Calzada** **David Fitz Ocampo** **Rodolfo Olea Patino, MBA** **Host: Patricia Tello-Villarino** Vendedor o Empresario Exitoso? Ideas de Ventas, Planificiacion y Continuidad de Negocio (S)	**Donald White, CLU, ChFC** Service Projects Can Be Life-Changing! (E)	**Tori Unger** Using the MDRT Member Toolkit (E)
3:30			**DAHLIA +** 15 Must-Have Productivity Apps (E)
4 p.m.			

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

MONDAY

Time	Speaker Zone 1	Speaker Zone 2	Speaker Zone 3
Noon–12:45	BUSINESS COACHING **Su Hyun Oh** 간편 재무설계를 통한 고객 어프 로치 횟수 늘리기 (K)	BUSINESS COACHING **Rajesh Chheda, ACA, CFP** जीवन के लिए ग्राहकों बनाने के लिए कैसे (H)	BUSINESS COACHING **Meila McKitty Plummer, LUTCF, FSS** Yes! You Can Have it All...Your All... (E)
1 p.m.–1:45	BUSINESS COACHING **Filemon Arcos Davila** La importancia de saber lo que quieres (S)	BUSINESS COACHING **Kritchanat Dechathanasingh** พลังแห่งกิจกรรม (T)	BUSINESS COACHING **Anthony Hui Wing Wah, LUTCF, FChFP** 高效信任力 (C)
2 p.m.	BUSINESS COACHING **Yang Hong Li** 用服務帶動銷售 (M)	**David Blake** Giving Back With Your MDRT Peers through the Foundation (E)	
3 p.m.	**Satoshi Ozawa** 人としてどう接するか？逆転の発想、質問力の重要性 (J)	**JB Griffith, Ph.D, ChFC** Make Clients Want To Do Business With Only YOU! (E)	EXHIBITOR **Status Factory** How YOU Can Become the Only Possible Choice for Your Customers & Prospects (E)
3:30	INSURANCE IN ACTION **Ting Ting Zhang** (M)	INSURANCE IN ACTION **Brent Kimball, CFP, ChFC** (E)	INSURANCE IN ACTION **Krits Pitimana-Aree** (T)
4 p.m.	**Marc Bineham, ADFS, FChFP** 30 Years of Listening to the Doyens, What I Have Learned (E)	EXHIBITOR **Transpacific Financial Inc.** 為何非美國居民要購買美國保險？購買程序為何？(M)	**Bryson Milley, CFP, CIM** Do You Really Know Your Clients? Are You Asking the Right Questions? (E)
4:30	**Chan Ka Man Carmen** 危疾治療新世代 (C)	EXHIBITOR **NAIFA** NAIFA LACP: Hallmark of Knowledge, Experience and Ethics (E)	EXHIBITOR **Advantage Media** Attract Your Ideal Client: Brand Positioning That Pays Dividends (E)
5 p.m.–5:30	**Ana Sofia Rodriguez, MBA** The Value of the MDRT Foundation (E)	EXHIBITOR **AIA Group** Envisioning Without Boundaries (E)	EXHIBITOR **Auchel World/Grand Prospects Financial & Insurance Services** 美國新挑戰，CRS，全球資產如何重新配置 (M)

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MONDAY

Time	Big Idea Theater	Great Conversations	Technology Zone
Noon	SHOW AND TELL **Matthew Charles Collins** Creating a Top of the Table Business That Can Withstand Time and Regulation (E)	CASE STUDY **Yun-ting Tseng** 財務規劃的案例分析 (M)	**David Blake** Selling High Limit Disability Insurance Using Web Based Enrollment Platforms (E)
1 p.m.	SHOW AND TELL **Host: Feng-Chiao Hsu** **Shu-Chun Lee** **Chin-Lung Wang** **Chih Chun Hung** 實務研討 (M)	CASE STUDY **Alessandro Forte, Dip PFS** The Secret of Success (E)	EXHIBITOR **Future Vault Inc.** Personal Data Management: Helping Your Client Securely Organize Their Life (E)
2 p.m.	SHOW AND TELL **Khajonsak Khraiwanit, CFP** **Chirawadee Hompetch, CFP, MBA** แผนการเงินชั่วชีวิต (T)	CASE STUDY **Kim Harding, CLU, and** **Ben Harding, CLU, CFP** Transitioning into a Comprehensive Fee Based Practice (E)	**Maribel Ruiz Ramos** Facebook y Mi Estrategia de Comunicación (S)
3 p.m.	PANEL **Zhenzhu Xue** **Haochen Su** **Jihong Li** 中国式家庭保险需求探索。(M)	**Joo Suk Kim** 블루오션 시장의 탐색 및 발굴 (K)	**Peter Hill, ChFC** Portfolio Construction Using a Financial Plan (E) **Ta-Hung Kuan** 站在雲端看世界 (M)
4 p.m.	INSURANCE IN ACTION **Maurizio Zolezzi** (S) **Tony Gordon** Moving from 10-3-1 to 10-9-8 (E)	**Pornprapa Sukreepirom** ชี้อนาคตของคุณจากวันนี้ (T)	**Miranda Knight** Make the Most of Your Member Benefits (E) **Kathryn Furtaw Keuneke, CAE** Resource Zone: MDRT's Multimedia Resources (E)
5 p.m.		**Caroline Kheng, ChFC** 百万圆桌基金会的价值 (M)	**DAHLIA +** Wellness Technologies for Your Body, Home and Office (E)
5:30			

TUESDAY

Time	Speaker Zone 1	Speaker Zone 2	Speaker Zone 3
Noon	TOP OF THE TABLE CONNECT **Mitchell Ostrove, CLU, ChFC** What I Have Learned in 50 Years of MDRT (E)	TOP OF THE TABLE CONNECT **Julia Cheng, CFP, MBA** Ten Effective Take Aways to Increase Your Sales of Life Insurance (E)	TOP OF THE TABLE CONNECT **Curtis Cloke, LUTCF, RICP** The 18 Risks of Retirement (E)
12:30	TOP OF THE TABLE CONNECT **Kyle Atkins, CLU, CFP** To the Top in Ten (E)	TOP OF THE TABLE CONNECT **Peter Byrne** Sorry We Don't Do Quotes (E)	TOP OF THE TABLE CONNECT **Tim Clairmont, CFP, MSFS** How to Move from Organic to Intentional Marketing (E)
1 p.m.	TOP OF THE TABLE CONNECT **Mark Dorfman, CLU, ChFC** 20 minutes to Perfect Knowledge (E)	TOP OF THE TABLE CONNECT **Randy Scritchfield, CFP, LUTCF** Reflection, Specialization and Collaboration to Build a Meaningful Practice (E)	TOP OF THE TABLE CONNECT **Marcus Henderson, LUTCF** Marketing the Genuine YOU (E)
1:30	**Atirach Dangwibul** ทำอย่างไรให้เป็นหนึ่งในใจลูกค้า. (T)	**Girish Bhatia** मधुमक्खी का छततो पर वार . .बमिा का हलला चालसि के सामनो (H)	**Angus McQueen, Dip FS, Dip CD** Your Future Clients (E)
2 p.m.	**Dimosthenis Sykovaris** Working with Referrals is About Helping Others, Not Ourselves (E)	**Richard Presky, LUTCF, CLU** Secrets to My Sales Success (E)	**Kobus Kleyn, CFP** The Power of Personal Branding and Presence through Social Media (E)
2:30	**Diana Sarol** Bust that Slump! (E)	**Arlyn Tan, MBA, FChFP** Spotting Gold Opportunities from Objections (E)	**Mark Rando** Looking After the Clients You Have (E)
3 p.m.	**Stephen Mathieu, ChFC, CLU** The Ten Minute Lesson on Selling Whole Life Insurance (E)	**Paresh Shah, CFP** Three Dimensional Planning for Business Owners (E)	**Cheng Ka Kit** 銷售概念分享 (C)
3:30	**Yi Ling Wang** 客户经营维护有道,人生事业长存 (M)	**Hong Li** 成为MDRT会员、迈向高端市场 (M)	EXHIBITOR **NAIFA** NAIFA LACP: Hallmark of Knowledge, Experience and Ethics (E)
4 p.m.	**Seung Bok Kim** 변액보험 어렵지 않아요! (K)	EXHIBITOR **MetLife Asia Limited** Be Customer Centric. Be Productive – A Path to MDRT (E)	EXHIBITOR **GWG Life, LLC** GWG Life: More Options for Senior Clients (E)
4:30	**Aleen Swofford, CLU, ChFC** Peanut Butter – How to Make Clients Sticky (E)	EXHIBITOR **Advisors Academy** Creating a Win/Win for Your Baby Boomer Clients and You (E)	**Sofia Zervoudaki** Choosing vs. Buying (E)
5 p.m.	EXHIBITOR **Family Business USA** Dirty Little Secrets of Family Business (E)	EXHIBITOR **Ohio National Financial Services** The Flexibility of Whole Life (E)	EXHIBITOR **Branded Expert Publishing** Don't Die with Your Message Still Inside You (E)
5:30			

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TUESDAY

Big Idea Theater

TOP OF THE TABLE CONNECT
Jiang Xiao Feng
高净值人士资产规划中的风险提示 (M)

TOP OF THE TABLE CONNECT
Thanarat Khumdee
มุ่งสู่จุดสูงสุด (T)

TOP OF THE TABLE CONNECT
Tse Sin Yan Carol
MDRT為起步到TOT (C)

PANEL
Tse Sin Yan Carol
Glen Wong
Tsui Yuen Tan
Host: Benjamin Hok Hei Tam
高峰對談 (C)

PANEL
Mieko Fukushima
Kusuo Yamaguchi
料率改定後の今こそチャンス (J)

INSURANCE IN ACTION
Marvin Feldman, CLU, ChFC (E)

Keiji Fukuchi, CFP
節税商品に頼らない社長、ドクターの攻略法 (J)

Great Conversations

TOP OF THE TABLE CONNECT
Yoshihiro Nishihara, TLC
経営者の心をわしづかみにする技術 (J)

TOP OF THE TABLE CONNECT
Luis Fernando Saad
Seguro de vida e previdência. Eles vão comprar ambos! (P)

TOP OF THE TABLE CONNECT
Steven Plewes, CLU, ChFC
The Wisdom Based Practice (E)

Joao Paulo Bottecchia
Efeitos dos impostos e inflação no planejamento financeiro (P)

James McEvoy, CLU, AEP
How to Deal with the World-Wide Phenomenon Called FATCA (E)

Julian Good Jr., CLU, ChFC
How to Get Difficult Life Insurance Cases Approved (E)

PANEL
Rahul Dhanani
Bhushan Limaye
Balasaheb Erande
अपने स्थानीय बाजार में सफलता हासिल करना (H)

Technology Zone

TOP OF THE TABLE CONNECT
Xiao Hong Tan
互联网新形势下品牌建设 (M)

TOP OF THE TABLE CONNECT
Daniel O'Connell, MBA
How to Build Your Business Using Social Media (E)

TOP OF THE TABLE CONNECT
Alejandro Marquez Espinosa, LCIC
La diferencia entre 99 y 100 grados (S)

Tori Unger
Using the MDRT Member Toolkit (E)

Yeonjoo Kim
22살 팔찌를 디자인하던 디자이너,
24 살 사람들의 삶을 디자인하다. (K)

DAHLIA +
Tools to Augment Your LinkedIn Profile (E)

Nithiroj Thanaolarnsin
การขยายลูกค้าผ่านการตลาดออนไลน์ (T)

DAHLIA +
Establishing Your Personal Brand (E)

Kathryn Furtaw Keuneke, CAE
Resource Zone: MDRT's Multimedia Resources (E)

DAHLIA +
Tips and Tricks to Tame Your Inbox (E)

Noon 12:05 12:10 **12:15** 12:20 12:25 **12:30** 12:35 12:40 **12:45** 12:50 12:55
1 p.m. 1:05 1:10 **1:15** 1:20 1:25 **1:30** 1:35 1:40 **1:45** 1:50 1:55
2 p.m. 2:05 2:10 **2:15** 2:20 2:25 **2:30** 2:35 2:40 **2:45** 2:50 2:55
3 p.m. 3:05 3:10 **3:15** 3:20 3:25 **3:30** 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. 5:05 5:10 **5:15** 5:20 5:25 **5:30**

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

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Mr. Zianni	18	
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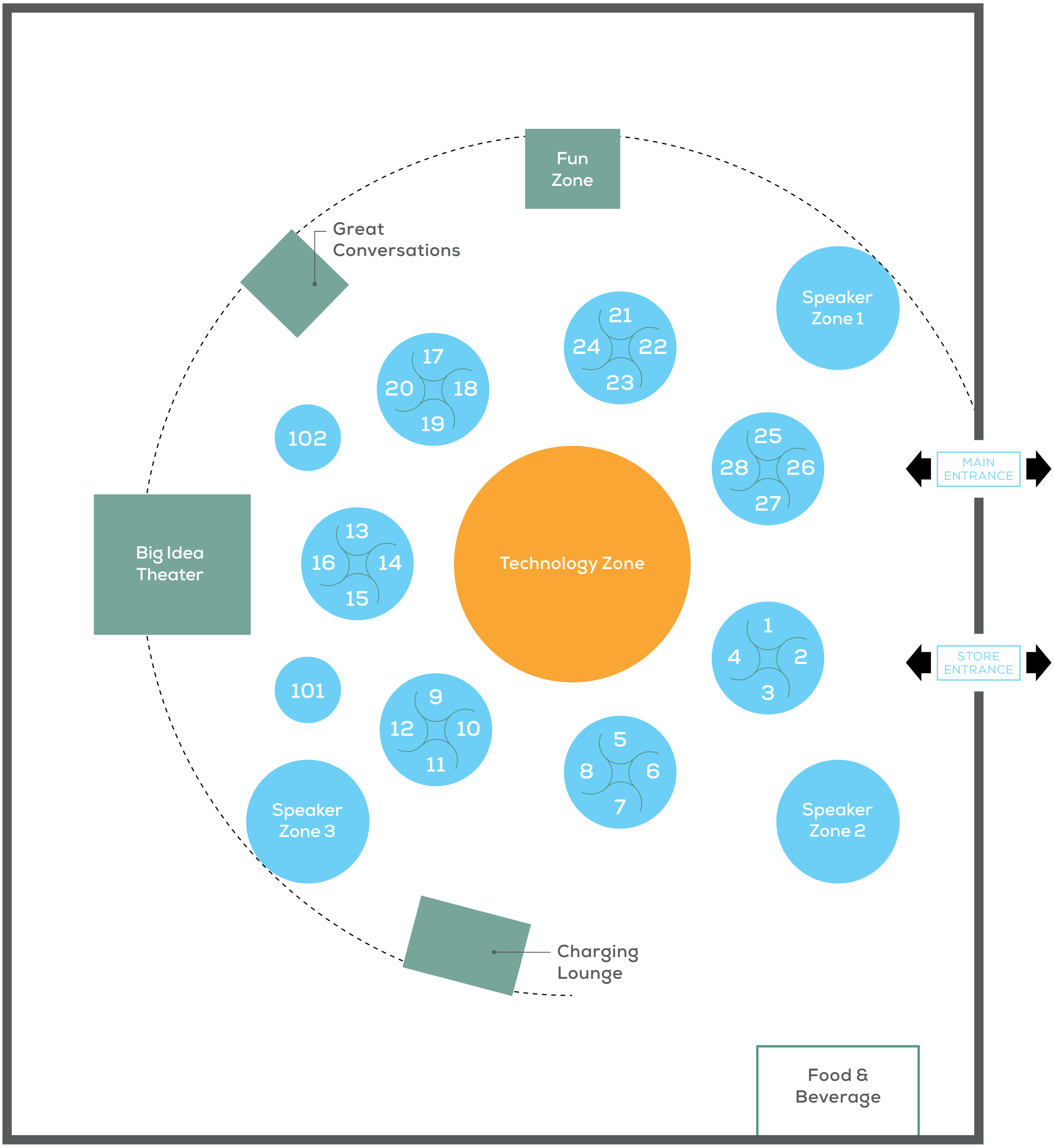
Pods are subject to change.

FLOOR PLAN


Fun Zone
Great Conversations
Speaker Zone 1
21 22 23 24
17 18 19 20
102
25 26 27 28
MAIN ENTRANCE
Big Idea Theater
13 14 15 16
Technology Zone
1 2 3 4
STORE ENTRANCE
101
9 10 11 12
5 6 7 8
Speaker Zone 3
Speaker Zone 2
Charging Lounge
Food & Beverage

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CONTINENTAL
SECURING YOUR TOMORROWS

POD: 21 The Continental Group is a leading insurance and financial services intermediary. Continental offers advisors across the globe 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 innovative solutions to high-net-worth clients.

PO Box 26588, Dubai, UAE
PHONE: +971-4-5091-555 TOLL FREE: +971-800-242 FAX: +971-4-5091-444
E-MAIL: pooja.sardana@cfsgroup.com WEBSITE: cfsgroup.com

FAMILY BUSINESS USA

POD: 15 Sixty-five percent of family businesses fail when transitioning from one generation to the next. Family Business USA works with family businesses to ensure family business succession by strengthening family harmony and maintaining strong business performance. We have backgrounds in psychology, and management consulting, and come from our own family businesses.

107 Glenhaven Dr., Chapel Hill, NC 27516
PHONE: 919-741-1943 EMAIL: Henry@familybusinessUSA.com WEBSITE: familybusinessUSA.com

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FHC

POD: 23 First Heartland offers an integrated approach to insurance, securities and managed money solutions to independent financial advisors working with one or all of our companies. We're committed to providing independent objectivity and simplifying all aspects of an advisor's business operations through advanced technologies, hands-on training and back-office support.

1839 Lake Saint Louis Boulevard, Lake Saint Louis, MO 63367
PHONE: 636-625-0900 FAX: 636-695-2858 TOLL-FREE: 800-444-7244
EMAIL: matt@firstheartland.com WEBSITE: joinfhc.com

FutureVault

POD: 14 Learn how FutureVault can help drive retention and growth for your business and differentiate your brand by offering a structured, white label digital filing cabinet to your clients. FutureVault's smart filing technology enables your clients to get organized easily, saves time and provides long-term peace of mind.

441 King St. W. Suite 200, Toronto, ON Canada M5V 2H1
PHONE: (647) 775-2695 TOLL-FREE: 1-844-538-2858
EMAIL: diane.pedreira@futurevaultinc.com WEBSITE: futurevault.com

TECHNOLOGY ZONE PRESENTER

GWG LIFE

POD: 24 GWG Life, LLC is a financial services company creating innovative products and services in the life insurance industry. Since 2006, GWG Life has purchased more than USD 2.3 billion in life insurance policy benefits and paid seniors more than USD 398 million for their life insurance.

220 S. 6th St., Ste 1200, Minneapolis, MN 55402
TOLL FREE: 877-494-2388 E-MAIL: info@gwglife.com WEBSITE: gwglife.com

POD: 101 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 also reminds people of the important role insurance professionals perform in helping families, businesses and individuals find the insurance products to fit their needs.

1530 Wilson Boulevard, Suite 1060, Arlington, VA 22209
PHONE: 703-888-4440 FAX: 888-887-5327 EMAIL: aenglert@lifehappens.org
WEBSITE: lifehappens.org

POD: 19 Life Insurance Settlements, Inc., has become the number one choice for professionals seeking life settlement options in the secondary market. Our long-standing relationship with the largest and most reputable institutional funding sources has empowered us to provide the maximum settlement amounts and compensation possible.

1180 SW 36th Ave, Suite 201, Pompano Beach, FL 33069
PHONE: 866-326-5433 FAX: 954-337-5731 EMAIL: csirianni@lisettlements.com
WEBSITE: lisettlements.com

POD: 27 MetLife, Inc. is one of the largest life insurance companies in the world. Founded in 1868, MetLife is a global provider of life insurance, annuities, employee benefits and asset management. Serving approximately 100 million customers, MetLife has operations in nearly 50 countries and holds leading market positions in the United States, Japan, Latin America, Asia, Europe and the Middle East.

39th Floor, Dorset House, Tai Koo Place, 979 King's Road, Hong Kong
PHONE: 852-2277-4149 FAX: 852-2968-1433 E-MAIL: szhang9@metlife.com
WEBSITE: metlife.com

PLATINUM SPONSOR

POD: 18 Over 12 years ago, Mr. Zianni had a vision of bringing together the highest quality of fabrics in men's Italian fashion with personalized delivery service. Today, Mr. Zianni Italian Design services over 1,000 clients in five states throughout the West Coast. Mr. Zianni brings with him the expertise in professional wear for top executives.

3943 Irvine Blvd. #46, Irvine, CA 92802
PHONE: 626-242-7271 TOLL FREE: 877-242-7271 E-MAIL: ziyaerhuy@hotmail.com

POD: 5, 6, 7, 8 The National Association of Insurance and Financial Advisors (NAIFA) is the leading association representing the interests of advisors and their clients. NAIFA provides professional development resources that foster career success. NAIFA's new Life and Annuity Certified Professional (LACP) certification sets an industry standard for recognizing knowledgeable and ethical insurance professionals.

2901 Telestar Court, Falls Church, VA 22042
PHONE: 703-770-8100 TOLL-FREE: 877-866-2432 FAX: 703-770-8224 EMAIL: LACP@naifa.org
WEBSITE: naifa.org\lacp

POD: 1 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
PHONE: 513-794-6100 TOLL-FREE: 877-665-2468 FAX: 513-794-4799
E-MAIL: julie_crow@ohionational.com WEBSITE: joinohionational.com

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POD: 25 We work with teams throughout the U.S. and Canada. We help advisors train and better utilize their staff by helping with time management and increasing overall productivity. We 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
PHONE: 952-829-5300 FAX: 952-829-5368 E-MAIL: gina@pellegriniteam.com
WEBSITE: pellegriniteam.com

POD: 16 Raising your status in the eyes of customers and prospects so that you are seen as the only possible choice.

3025 Sunset Blvd, Los Angeles, CA 90026
PHONE: 310-415-0450 EMAIL: info@StatusFactory.com WEBSITE: StatusFactory.com

BIG IDEA THEATER PRESENTER

POD: 28 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 every 90 days to learn concepts and tools they can use to achieve greater freedom, simplicity, balance, focus and confidence in every area 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: strategiccoach.com

POD: 10 The Taylor Method is a sales training system that provides powerful sales language for financial advisors. It was created by Eszylfie Taylor, an active Top of the Table producer, and is designed to give your advisors language and concepts that are easy to use and can be quickly deployed.

PO Box 395, Pasadena, CA 91102
PHONE: 800-708-8212 E-MAIL: TheCloser@TheTaylorMethod.com
WEBSITE: TheTaylorMethod.com

POD: 26 Transpacific Financial Inc. is the largest Asian GA in the U.S. with 2,000+ contracted professional agents. Every member of the staff can speak at least two languages to support agents whose preferred language is not English. Transpacific specializes in financial and estate planning, living benefit alternatives and custom-case design.

185 W. Chestnut Ave, Monrovia, CA 91016
PHONE: 626-447-7888 TOLL-FREE: 888-831-8868 FAX: 626-737-6035
E-MAIL: noel.sung@transpacificagency.com WEBSITE: transpacificagency.com

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POD: 20 The Private Client Reserve of U.S. Bank serves successful individuals and families with complex financial interests and needs. We provide holistic wealth management services to clients, and specialize in advising business owners, corporate executives, and professional service principals and partners.

190 S. LaSalle St. Suite 1100, Chicago, IL 60603
PHONE: 312-325-8801 | 312-325-2076 E-MAIL: dominic.cotrano@usbank.com | carlo.gozzi@usbank.com WEBSITE: reserve.usbank.com/

GENERAL INFORMATION

Admission: Name Badges and Tickets

Name Badge: Your personal meeting name badge is required for entrance into ALL sessions and events. There will be a USD 995 fee for each replacement badge issued. First-time meeting attendees can be identified by their green badge. Please extend a warm welcome and helping hand to them.

Tickets: Tickets are required to attend events such as the Court of the Table and Top of the Table Program and Breakfast/Lunch Sessions. Attendees who registered in advance will find these tickets included with their badges. 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.

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 the next page for further details.

Destination Lounge

Relax and recharge in the Destination Lounge. The lounge offers a space where attendees can sit comfortably and charge their devices. Located in the Convention Center – South Concourse, Level II.

Electronics

Audio recordings, video recordings and photography are prohibited in ALL sessions, including Main Platform. To avoid disturbances to speakers and other attendees, ensure all sound-emitting electronic devices are turned off or set to silent mode during sessions. It is considered impolite to answer your phone during sessions. Thank you for observing this courtesy. Also, please note that selfie sticks/poles are prohibited from use during ALL sessions as well as within the Convention Center and within the official hotels.

First Aid/Emergency Assistance

Should you need medical assistance of any kind, contact MDRT staff, convention center staff or hotel staff. First Aid offices are located in both the South and North Concourses of the Convention Center.

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 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.

Lost and Found

Lost and Found is located at the On-Site Services counter in the Convention Center – South Hall B.

Food and Beverage Options

Beverages, snacks and lunch can be found at a number of locations in the Convention Center. In addition to offerings in the ConneXion Zone, options can be found in the South Concourse, Southside Restaurant and Cypress Café Food Court. Nearby Hilton Orlando, Hyatt Regency and Rosen Centre hotel restaurants are options as well.

Orlando Information

Visit Orlando operates two guest services desks at the Convention Center – South Concourse, Level II. Get area maps, book restaurant reservations and purchase discounted attraction tickets to Walt Disney World, Universal Theme Parks and SeaWorld.

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.

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.

Seating

Seating for all sessions, excluding Main Platform reserved seating, is on a first-come, first-served basis. Saving seats is prohibited. Due to fire marshal codes, no one may be admitted once Focus Session rooms are filled to capacity. Please be respectful of MDRT staff and PGA Traffic Task Force volunteers if you arrive too late to be admitted to the session.

Special-Needs Seating: For Main Platform sessions, a section is reserved for members with special needs who have indicated this on their meeting registration.

Simultaneous Interpretation

The availability of headsets and receivers is not guaranteed to members who did not request simultaneous interpretation when registering in advance. Only registered attendees are eligible to receive interpretation equipment and must obtain their meeting name badge before receiving their equipment. The attendee must agree to assume full responsibility for the equipment for the duration of the meeting. If the equipment is lost, stolen, damaged or not returned to the Interpretation Headset counter in Convention Center – South Hall B at the conclusion of the meeting, the attendee will be billed and must pay USD 400. Assisted listening devices will also be available to members who request the service through registration and are subject to the same terms as interpretation equipment.

SATURDAY, JUNE 3	11 A.M. – 6 P.M.
SUNDAY, JUNE 4	7 A.M. – 7 P.M.
MONDAY, JUNE 5	7 A.M. – 4 P.M.
TUESDAY, JUNE 6	7 A.M. – 4 P.M.
WEDNESDAY, JUNE 7	7 A.M. – 6 P.M.

Unattended Personal Items

For the safety of our attendees, security will confiscate any personal items, including luggage, left unattended in any session room. You will not be allowed to bring luggage into any session room at any time.

Wi-Fi

Complimentary wi-fi is available throughout the Convention Center and Hilton meeting areas. Select MDRT 2017 in your settings (no password required).

Zen Lounge

Retreat to this quiet space with mindfulness expert Lee Papa for meditation exercises that provide benefits such as better sleep, less jet lag symptoms, reduced anxiety and a higher level of learning. To sign up for sessions, stop by the Zen Lounge located in the Convention Center – S210 B. Availability on a first-come, first-served basis. Instructions provided in English.

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

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 appropriate 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.

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 industry and the Million Dollar Round Table.
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.

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
1976	*Rulon E. Rasmussen, CLU	New York Life, Phoenix, Arizona	The Hynes Auditorium, Boston, Massachusetts	11,804

*Deceased

YEAR	PRESIDENT	COMPANY	MEETING LOCATION	MEMBERS
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'Donnell, 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. Hoesly, CLU, ChFC	Resource 1 Inc., Norfolk, Virginia	Metro Toronto Convention Centre, Toronto, Ontario, Canada	42,729
2015	Caroline A. Banks, FPFS	Caroline Banks & Associates, London, England	Ernest N. Morial Convention Center, New Orleans, Louisiana	43,190

FUTURE MEETING DATES

MDRT Annual Meeting

Los Angeles, California
June 24–27, 2018

Top of the Table Annual Meeting

Ranchos Palos Verdes, California
October 18–21, 2017

MDRT Experience & Global Conference

Bangkok, Thailand
February 8–10, 2018

MDRT®

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