

2020 ANNUAL MEETING

June 7 – 10 – ANAHEIM, CA

Program Draft #5

4.16.20

WEDNESDAY, June 3, 2020

2:00 p.m. – 3:00 p.m.
ACC-

PreCon: Transportation (TBD)

2:00 p.m. – 3:30 p.m.
AV & IT Office
ACC- 205A

Session Room Set/Reset/TD Meeting

4:00 p.m. – 5:00 p.m.
Vendor Meeting Room
ACC- Mezzanine B

PreCon: Security (TBD vendor and ACC Security)

THURSDAY, June 4, 2020

10:00 a.m. – 11:00 a.m.
HI -

PreCon: Hilton

11:30 a.m. – 12:30 p.m.
MA-

PreCon: Marriott

2:30 p.m. – 3:30 p.m.
ACC-

PreCon: ACC

5:00 p.m. – 6:00 p.m.
Staff Office
ACC- 210B

Staff Tour

6:30 p.m.
Off-Site: Morton's Steakhouse- PDR
6:00 p.m.
6:15 p.m.
6:30 p.m.

ExCom Dinner
(CLOSED EVENT)

All meet in ExCom suite (HI- El Presidential Suite #14-340)
Walk to restaurant
Arrive at restaurant for 6:30 reservations

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FRIDAY, June 5, 2020

7:00 a.m. – 10:00 a.m.

Ex Com Suite

HI- El Presidential Suite #14-340

7:00 a.m. – 7:30 a.m.

7:30 a.m. – 8:30 a.m.

8:30 a.m. – 10:00 a.m.

ExCom Breakfast Meeting

(CLOSED EVENT)

Breakfast

Meeting

Facility Tour – HI, MA, ACC

8:00am – 6:00pm

MP Hall

ACC- Hall D

MP Technical Rehearsals

10:00 a.m. – 11:00 a.m.

ACC -

Visit Anaheim Desk Debrief

11:30 a.m.

HI- Meet in Lobby by Concierge Desk

ExCom Spouse Tour (given by ExC Valet)

– HI, MA, ACC

11:30 a.m. – 3:30 p.m.

MA-

11:30 a.m. – 12:30 p.m.

MA- Orange County- Salon 3

(J, K, M)

2021 Global Council Lunch & Meeting

(CLOSED EVENT)

Global Council Lunch

12:30 p.m. – 3:30 p.m.

MA- Orange County Salons 1-2

(J, K, M)

Global Council Meeting

1:00 p.m. – 4:00 p.m.

ACC- Hall C

Sponsor Move In ConneXion Zone

1:00 p.m. – 5:00 p.m.

HI- El Capitan AB

1:00 p.m.

2:00 p.m.

3:00 p.m.

2020 PGA Leadership Meeting

(CLOSED EVENT)

DVP meet s w/Chairs

Directors meet w/Chairs

PGA AD's/Staff Liaisons Arrive & meet w/ Directors

2:00 p.m. – 3:00 p.m.

Global Markets Room #1

ACC- 208A

Meeting with CSI

(CLOSED EVENT)

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FRIDAY, June 5, 2020 (Continued)

3:30 p.m.

Staff Meeting Room
ACC- 210CD

Staff Meeting
(CLOSED EVENT)

4:00 p.m.

ACC- Hall C

Sponsor Inspection

4:00 p.m. – 5:00 p.m.

(J, K, M, S, T)

2020 PDC Meeting
(CLOSED EVENT)

4:15 p.m. – 5:30 p.m.

Staff Meeting Room
ACC- 210CD

Staff Tour

5:30 p.m. – 6:00 p.m.

MA- Grand Ballroom EF

Committee Chair Tech Check

Speaker:

ExCom: Ian Green, DipPFS

6:30 p.m. – 10:00 p.m.

Offsite: The Ranch Events Center
Great Room

2020 PGA/PDC Leadership Reception and Dinner
(CLOSED EVENT - PRE-MEETING INVITE)
Transportation Provided: Pick-up location **TBD**

6:30 p.m. – 7:00 p.m.

7:00 p.m. – 10:00 p.m.

Reception

Dinner

(J, K, M, S, T)

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SATURDAY, June 6, 2020

7:00 a.m.

HI- Executive Ante & Boardroom

PGA Directors Breakfast

(CLOSED EVENT)

7:15 a.m. – 8:15 a.m.

MA- Grand Ballroom EF

Committee Chair Tech Check

Speaker:

7:30 a.m. – 10:30 a.m.

MA-

2021 Committee Chairs Breakfast/Meeting

(CLOSED EVENT)

7:30 a.m. – 8:15 a.m.

MA- Orange County- Salons 1-2

Committee Chairs Breakfast

8:30 a.m. – 10:30 a.m.

MA- Grand Ballroom EF

(J, K, M, S)

Committee Chairs Meeting

Speaker:

8:00am – 5:00pm

MP Hall

ACC- Hall D

MP Technical Rehearsals

8:00am – 6:00pm

Special Guest Office

ACC- 211AB

Special Guest Office Open Hours

10:00 a.m. – 12:00 p.m.

ACC- Ballroom B

MetLife Half-Day Session Rehearsals

11:00 a.m. – 5:00 p.m.

ACC- Hall C

ConneXion Zone, MDRT Foundation Booth & MDRT Store Open

11:00 a.m. – 6:00 p.m.

ACC- Hall C

Registration Open

11:00 a.m. – 6:00 p.m.

ACC-

Meeting App Kiosk Open

~~11:30 a.m.~~

~~L-~~

~~**MCC Group Photos**~~

~~(All, Division 1, Division 2)~~

11:30 a.m. – 12:30 p.m.

MCC Meeting

11:30 a.m. – 12:30 p.m.

MetLife Private Reception (Lunch)

(CLOSED EVENT)

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SATURDAY, June 6, 2020 (Continued)

12:00 p.m. – 1:00 p.m.

ACC- Ballroom C

MetLife Luncheon

(At MetLife Expense- Non- MDRT Official Event- CLOSED EVENT)

1:00 p.m. – 4:00 p.m.

ACC- Ballroom B

(J, K, M)

MetLife Half-Day Session

(CLOSED EVENT- Pre-Meeting Invite Only)

~~1:00 p.m. – 4:00 p.m.~~

~~ACC-~~

AIA Half-Day Session

1:00 p.m. – 2:30 p.m.

2021 Top of the Table Advisory Board Orientation

(CLOSED EVENT – BY INVITATION)

2:15 p.m. – 3:30 p.m.

MA- Marquis Ballroom Center &
Northeast/Northwest

PGA Kickoff Tech Check

3:00 p.m. – 4:00 p.m.

Past Presidents Suite

MA- Chairman's Suite #1908

Past Presidents Meeting

(CLOSED EVENT)

4:30 p.m. – 5:30 p.m.

MA- Marquis Ballroom Center &
Northeast/Northwest

PGA Kickoff

4:30 p.m. – 4:55 p.m.

(C, J, K, M, S, T)

SESSION

PGA DVP: Yuka Nakahara-Goven, MBA, CLU

MDRT President: Regina Bedoya, CLU, ChFC

Guest Speaker:

4:55 p.m. – 5:30 p.m.

BREAKOUTS

MA- Traffic General

MA- Traffic Sessions I and II

MA- Traffic Main Platform

MA- MDRT Store

MA- Meeting Involvement

MA- Registration

6:00 p.m. – 7:30 p.m.

HI- Avalon Ballroom

(Lobby Level)

Excalibur Reception

(INVITATION ONLY-MAJOR DONORS)

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SATURDAY, June 6, 2020 (Continued)

6:00 p.m. – 10:00 p.m.

MA-

**MetLife Gala Awards Dinner
(Not an Official MDRT Event)**

6:00 p.m. – 7:00 p.m.

MA- Grand Ballroom A-D

Reception

7:00 p.m. – 10:00 p.m.

MA- Grand Ballroom E-F
(M, K, J)

Dinner & Awards

~~7:00 p.m. – 8:30 p.m.~~

~~XX~~

~~**MDRTeam Kick-off Event *TBD***
(CLOSED EVENT)~~

7:00 p.m. – 10:00 p.m.

Offsite:

Celebrating Leadership
(Top of the Table Leadership Dinner)

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SUNDAY, June 7, 2020

7:00 a.m. – 8:00 a.m.

HI-

Special Breakfast Meeting

(CLOSED EVENT)

7:00 a.m. – 10:00 a.m.

HI- Executive Ante & Boardroom

PGA Directors Breakfast

(CLOSED EVENT)

7:00 a.m. – 7:00 p.m.

ACC-

Meeting App Kiosk Open

8:00 a.m. – 9:30 a.m.

Foundation Conference Room

ACC- 213A

Foundation Gives Day and Global Breakfast

(CLOSED EVENT PRE-MEETING INVITE)

8:00 a.m. – 7:15 p.m.

MP Hall

ACC- Hall D

Main Platform/Opening Ceremony Speaker Rehearsals

(CLOSED EVENT)

8:00am – 6:30pm

Special Guest Office

ACC- 211AB

Special Guest Office Open Hours

9:00 a.m. – 10:00 a.m.

Ambassadors Program Meeting

(CLOSED EVENT PRE-MEETING INVITE)

9:00 a.m. – 6:30 p.m.

ACC- Hall C

Registration Open

11:00 a.m. – 12:00 p.m.

MA- Marquis Ballroom Center &

Northeast/Northwest

Court of the Table - Top of the Table Tech Check

(CLOSED EVENT)

COT/TOT Speaker Daymond John will not attend tech check

11:00 a.m. – 12:45 p.m.

MA- Orange County- Salons 1-3

MDRT Foundation Board Lunch

(CLOSED EVENT)

11:45 a.m.

Lunch Buffet in room

11:00 a.m. – 5:00 p.m.

ACC- Hall C

ConneXion Zone, MDRT Foundation Booth & MDRT Store Open

11:30 a.m. – 12:30 p.m.

Band Reh/Storage Rm

ACC-

Band Luncheon

(CLOSED EVENT)

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SUNDAY, June 7, 2020 (Continued)

1:00 p.m. – 3:30 p.m.

MA-

**COURT OF THE TABLE AND TOP OF THE TABLE
PROGRAM AND RECEPTION (TICKETED EVENT)**

1:00 p.m. – 2:30 p.m.

MA- Marquis Ballroom Center &
Northeast/Northwest

(C, Hi, Hu, I, J, K, M, P, S, T)

PROGRAM: The Power of Broke

SPEAKER: Daymond John

Moderator:

2:30 p.m. – 3:30 p.m.

MA- Grand Ballroom

RECEPTION

1:30 p.m.

Staff Meeting Room

ACC- 210CD

**STAFF MEETING
(CLOSED EVENT)**

1:30 p.m. – 3:30 p.m.

MP Hall - Backstage

ACC- Hall D

**Flag Bearer Assembly, Instruction & Rehearsal
(CLOSED EVENT)**

1:30 – 2 p.m. Flag Bearer Assembly
2 – 2:30 p.m. Flag Bearer Instructions (Off Stage)
2:30 – 3:30 p.m. Flag Bearer Rehearsal (On-Stage)

3:00 p.m. – 4:30 p.m.

ACC-

***NEW* FAM: The Arrival** (First-time Attendee Meeting- Language Specific)

Languages

TBD Room- Cantonese

TBD Room- English

TBD Room- Hindi

TBD Room- Japanese

TBD Room- Korean

TBD Room- Mandarin

TBD Room- Spanish

TBD Room- Thai

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SUNDAY, June 7, 2020 (Continued)

3:30 p.m. – 6:30 p.m.

MP Hall – Backstage Green Room
ACC- Hall D

OC Speakers Dinner

(Closed Event)

4:30 p.m. – 5:00 p.m.

MP Hall
ACC- Hall D

Opening Ceremony Doors Open & Music Begins

5:00 p.m. – 6:30 p.m.

MP Hall
ACC- Hall D

OPENING CEREMONY

President: Regina Bedoya, CLU, ChFC

~~Video Opening~~

Official Opening of Meeting Regina Bedoya, CLU, ChFC

Flag Ceremony

Moment of Reflection

Recognition of the Past Presidents

7:00 p.m. – 8:30 p.m.

6:45 p.m. (Soft Open)

US Member Reception

(CLOSED EVENT – BY INVITATION)

7:30 p.m. – 8:30 p.m.

(7:15 p.m. soft open)

HI- Avalon Ballroom
(Lobby Level)

Special Guest Reception

(CLOSED EVENT – BY INVITATION)

7:30 p.m. – 9:00 p.m.

****UNOFFICIAL EVENT****

MCC Canada Reception

9:00 p.m. – 11:00 p.m.

PGA Suite
HI- Lanai Presidential Suite #5-230

PGA Best Worker Presentation

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MONDAY, June 8, 2020

6:00 a.m.

HI- Executive Ante & Boardroom

PGA Directors Breakfast

(CLOSED EVENT)

6:00 a.m. – 7:30 a.m.

HI-

MDRT Focus Group – TBD

(CLOSED EVENT – INVITATION ONLY)

6:00 a.m. – 6:00 p.m.

MDRT App Review Meetings

6:30 a.m.

MP Hall (Green Room-Backstage)

ACC- Hall D

MP Speakers Breakfast

(CLOSED EVENT)

7:00 a.m. – 4:00 p.m.

ACC- Hall C

Registration Open

7:00 a.m. – 4:00 p.m.

ACC-

Meeting App Kiosk Open

7:00am – 5:00pm

Special Guest Office

ACC- 211AB

Special Guest Office Open Hours

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MONDAY, June 8, 2020 (Continued)

7:15 a.m.

MP Hall
ACC- Hall D

Main Platform Doors Open

8:00 a.m. – 11:00 a.m.

MP Hall
ACC- Hall D

7:30 a.m. Live Entertainment Begins
MAIN PLATFORM

Presiders: Regina Bedoya, CLU, ChFC
Ross Vanderwolf, CFP

Open and Recognition of Special Guest

BREAK (20 Min)

Back from Break Entertainment
Presidential Address

Regina Bedoya, CLU, ChFC:

Recognition: Foundation Sponsors and Quality of Life Awards

Foundation President:

Foundation Speaker:

ADJOURNMENT

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9:00 a.m.

Staff Meeting Room
ACC- 210CD

STAFF MEETING

(Closed Event)

9:00 a.m. – 10:00 a.m.

AV & IT Office
ACC- 205A

AV Tech Training

10:30 a.m. – 11:00 a.m.

MA- Grand Ballroom EF

Lunch Session Tech Check

11:00 a.m. – 5:00 p.m.

ACC- Hall C

ConneXion Zone, MDRT Foundation Booth and MDRT Store Open

11:00 a.m. – 1:30 p.m.

PGA/PDC Workroom
ACC- 202AB

Focus Session Team/Staff Lunch Pick-Up

11:30 a.m. – 1:00 p.m.

MA- Grand Ballroom EF

LUNCH SESSION

(PREPAID TICKETED EVENT)- USD 60

TITLE:

SPEAKER: Steve Sims

Moderator:

12:00--12:20 p.m./12:30—12:50 p.m.

ACC and MA Session Rooms

FOCUS SESSION REHEARSALS –

(Monday sessions)

12:00 p.m. – 1:30 p.m.

Company Meeting

(CLOSED EVENT – PREMEETING INVITE)

12:00 p.m. – 1:30 p.m.

HI-

MDRT Focus Group – TBD

(CLOSED EVENT – INVITATION ONLY)

12:00 p.m. – 1:30 p.m.

Special Guests Luncheon

(BY INVITATION)

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MONDAY, June 8, 2020 (Continued)

1:00 p.m. – 2:00 p.m.

Foundation Conference Room
ACC- 213A

****UNOFFICIAL EVENT****

MDRT Foundation Canada Meeting
(CLOSED EVENT)

1:00 p.m. – 5:00 p.m.

ACC-

~~MDRT Foundation Satellite Pop Up Booth Open~~

1:00 p.m. – 5:00 p.m.

MP Hall
ACC- Hall D

MDRT SPEAKS SPEAKER REHEARSALS
(Tuesday MP)

1:30 p.m. – 2:30 p.m.

ACC and MA Session Rooms

FOCUS SESSIONS #1

1:30 p.m. – 2:30 p.m.

Presented in: Cantonese

Magical "+1" in Chasing Court of the Table

Susanna Chan Wai Ying

Spkr Lsn:

Track: Practice Management

1:30 p.m. – 2:30 p.m.

Presented in: English

Moving Forward by Looking Inward

Meagan S. Balaneski, CFP, RFP

Spkr Lsn:

Track: Whole Person

1:30 p.m. – 2:30 p.m.

Presented in: English
Interpreted: J, S

The Clock Presentation You Must Know

Timothy Daniel Clairmont, CFP, MSFS

Spkr Lsn:

Track: Advising Clients

1:30 p.m. – 2:30 p.m.

Presented in: English
Interpreted: Hi, T

Evolutionary Advisor: From Generalist to Niche

Todd Fithian

Spkr Lsn:

Track: Marketing

1:30 p.m. – 2:30 p.m.

Presented in: English
Interpreted: C, K

The Psychology of Converting Prospects to Clients

Simon Singer, CAP, CFP

Spkr Lsn:

Track: Advising Clients

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MONDAY, June 8, 2020 (Continued)

1:30 p.m. – 2:30 p.m.

Presented in: English

The Secret Ability to Sustain the Focus You Need
Corey Williams

Spkr Lsn:
Track: Whole Person

1:30 p.m. – 2:30 p.m.

Presented in: Hindi

Creating Strong Relationships and Solutions
Anil Ranka

Spkr Lsn:
Track: Advising Clients

1:30 p.m. – 2:30 p.m.

Presented in: Japanese

Excavate Estate Planning Cases by Visiting Existing Clients
Kusuo Yamaguchi

Spkr Lsn:
Track: Practice Management

1:30 p.m. – 2:30 p.m.

Presented in: Korean

The True Value of Life Insurance
Joon Hee Park

Spkr Lsn:
Track: Advising Clients

1:30 p.m. – 2:30 p.m.

Presented in: Mandarin

Efficiently Trade Full Life Insurance for Middle-Class Families
Chih-Cheng Jen

Spkr Lsn:
Track: Advising Clients

1:30 p.m. – 2:30 p.m.

Presented in: Mandarin

Improve Client Quality and Develop High-Quality Markets
Zhang Sha

Spkr Lsn:
Track: Marketing

1:30 p.m. – 2:30 p.m.

Presented in: Spanish

The Key is Loyalty
Dorin Roxana Israelian

Spkr Lsn:
Track: Practice Management

1:30 p.m. – 2:30 p.m.

Presented in: Thai

Good Health Brings Wealth
Pachthanatt Thaksarathanunth

Spkr Lsn:
Track: Whole Person

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2:30 p.m. – 3:00 p.m.

BREAK

3:00 p.m. – 4:00/4:30 p.m.

ACC and MA Session Rooms

FOCUS SESSIONS #2

3:00 p.m. – 4:00 p.m.

Presented in: Cantonese

Starting from Yourself, Create a Successful Environment Around You

Kung Yin Leung

Spkr Lsn:

Track: Practice Management

3:00 p.m. – 4:00 p.m.

Presented in: English

How to Successfully Manage and Market Your Business

Marc A. Silverman, CFP, ChFC

Spkr Lsn:

Track: Marketing

Interpreted: (M ONLY)

3:00 p.m. – 4:00 p.m.

Presented in: Mandarin

Building an Empowered MDRT Team

Zuo Jun

Spkr Lsn:

Track: Practice Management

3:00 p.m. – 4:30 p.m.

Presented in: English

How to Effectively Leverage LinkedIn and Social Media for Lead Generation

Philip Calvert, FPSA

Kyriakos Chatzistefanou, DMS, CMI

Tara Clark

Spkr Lsn:

Track: Marketing

3:00 p.m. – 4:30 p.m.

Presented in: English

Top of the Table with Incorporated Professionals

Adrian George, CFP, TEP

Spkr Lsn:

Track: Marketing

Interpreted: C, J

3:00 p.m. – 4:30 p.m.

Presented in: English

5 Lessons from Top of the Table

Karl Hartey

Spkr Lsn:

Track: Practice Management

Interpreted: S, T

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3:00 p.m. – 4:30 p.m.

Presented in: English

Cash-Value Life Insurance Strategies

Van Mueller, LUTCF

Spkr Lsn:

Track: Advising Clients

3:00 p.m. – 4:30 p.m.

Presented in: English

Interpreted: Hi, K

Take Charge of Your Mind

Cherry Pua Africa

Spkr Lsn:

Track: Practice Management

3:00 p.m. – 4:30 p.m.

Presented in: Hindi

Prospecting, Relationships and Marketing: The Soul of Your Business

Rohit N. Dhanani, B Comm, CIS

Chhaganlal G. Gadhia

Spkr Lsn:

Track: Marketing

3:00 p.m. – 4:30 p.m.

Presented in: Japanese and Korean
Panel Style- 2 Japanese speakers, 2 Korean speakers)

Interpreted: J, K

Learning from MDRT Membership to Overcome Difficulties (Region D, MCC Panel)

Shuhei Ino (J)

Naoki Masuda (J)

Doo Hyun Kim (K)

In Kyo Kim (K)

Spkr Lsn:

Track: Advising Clients

3:00 p.m. – 4:30 p.m.

Presented in: Spanish

Emotionally Intelligent Leadership

Patricia Salazar Barbagelata

Spkr Lsn:

Track: Practice Management

3:00 p.m. – 4:30 p.m.

Presented in: Thai

Search for an Identity and Method of Service that Meets Client Needs

Paveennuch Cheowtirakul

Suwannee Jamsavang

Eakasak Narksakul

Thattana Sritaraksa

Spkr Lsn:

Track: Advising Clients

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MONDAY, June 8, 2020 (Continued)

3:00 p.m. – 5:00 p.m.

MA- Orange County Salons 1-3

Foundation Service Project

Partner: Clean the World Foundation- Hygiene Kit Packing

4:00 p.m. – 5:00 p.m.

Sponsor #1 VIP Reception- Hosted by the MDRT Executive Committee

(CLOSED EVENT – BY INVITATION)

4:30 P.M. – 5:30 P.M.

Press Interview Room

Press Reception

(CLOSED EVENT- PRE-MEETING INVITE)

5:00 p.m. – 6:00 p.m.

HI- Avalon Ballroom

(Lobby Level)

Quarter Century Club

(CLOSED EVENT – QC MEMBERS ONLY)

5:30 p.m. – 6:30 p.m.

HI- Pacific Ballroom A

Top of the Table Reception

(CLOSED EVENT – TOP OF THE TABLE MEMBERS ONLY)

6:00 p.m. – 10:00 p.m.

Offsite: The Ranch Events Center - 6th Fl
The Dining Rm, Hospitality Suite & Outdoor
Terrace

Past Presidents' Reception/Dinner

(CLOSED EVENT – PRE-MEETING INVITE)

9:00 p.m. – 11:00 p.m.

PGA Suite

HI- Lanai Presidential Suite #5-230

PGA Best Worker Presentation

**OPEN EVENING FOR ALL COMPANY AND
NON-MDRT SPONSORED EVENTS**

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TUESDAY, June 9, 2020

6:00 a.m.

HI- Executive Ante & Boardroom

PGA Directors Breakfast

(CLOSED EVENT)

6:00 a.m. – 7:30 a.m.

HI-

MDRT Focus Group – TBD

(CLOSED EVENT - BY INVITATION)

6:00 a.m. – 6:00 p.m.

MDRT App Review Meetings

6:30 a.m.

MP Hall (Green Room - Backstage)

ACC- Hall D

MDRT SPEAKS SPEAKER BREAKFAST

(CLOSED EVENT)

7:00 a.m. – 4:00 p.m.

ACC-

Meeting App Kiosk Open

7:00 a.m. – 5:00pm

Special Guest Office

ACC- 211AB

Special Guest Office Open Hours

7:15 a.m. – 7:30 a.m.

Meet at Foundation Conference Room

ACC- 213A

Quality of Life Photo Shoot

7:15 a.m.

MP Hall

ACC- Hall D

MDRT SPEAKS Doors Open

7:30 a.m. – 4:00 p.m.

ACC- Hall C

Registration Open

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TUESDAY, June 9, 2020 (Continued)

8:00 a.m. – 11:00 a.m.

MP Hall

ACC- Hall D

MDRT SPEAKS

Presiders: Ian Green, DipPFS and Randy L. Scritchfield, CFP, LUTCF

Incoming Presidential Address: Ian Green, DipPFS

MDRTAKEAWAYS (38 min)

SUMMARIZE- (7 min)

GUIDED DEVELOPMENT (39 min)

LAUGH INTO BREAK- (8 min)

BREAK (15 min)

Real Life Stories Video (3 min)

WHOLE PERSON AND MORE (23 min)

Real Life Stories Video (3 min)

SUMMARIZE- (7 min)

WHOLE PERSON AND MORE CONTINUED (29 min)

SUMMARIZE- (7 min)

11:00 a.m. **ADJOURNMENT**

2020 ANNUAL MEETING

June 7 – 10 – ANAHEIM, CA

Program Draft #5

4.16.20

TUESDAY, June 9, 2020 (Continued)

9:00 a.m.

Staff Meeting Room
ACC- 210CD

STAFF MEETING

(Closed Event)

10:30 a.m. – 11:00 a.m.

MA- Grand Ballroom EF

Lunch Session Tech Check

11:00 a.m. – 5:00 p.m.

ACC- Hall C

ConneXion Zone, MDRT Foundation Booth & MDRT Store Open

11:00 a.m. – 1:30 p.m.

PGA/PDC Workroom
ACC- 202AB

Focus Session Team/Staff Lunch Pick-Up

11:30 a.m. – 1:00 p.m.

MA- Grand Ballroom EF

LUNCH SESSION

(PREPAID TICKETED EVENT – USD 60)

TITLE:

SPEAKER: Curt Steinhorst

Moderator:

11:30—11:50 a.m./12:00—12:20 p.m.

ACC and MA Session Rooms

FOCUS SESSION REHEARSALS –

(for Tuesday sessions)

12:00 p.m. – 1:30 p.m.

Top of the Table Past Chair's Lunch

(CLOSED EVENT – PRE-MEETING INVITE)

12:00 p.m. – 1:30 p.m.

HI-

MDRT Focus Group – TBD

(CLOSED EVENT - BY INVITATION)

12:00 p.m. – 1:30 p.m.

Association Executives Luncheon

(CLOSED EVENT- PRE-MEETING INVITE)

12:00 p.m. – 1:30 p.m.

Foundation Conference Room

Foundation Global Engagement Committee Lunch

12:30 p.m. – 12:50 p.m.

CORNERSTONE REHEARSALS

2020 ANNUAL MEETING

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4.16.20

TUESDAY, June 9, 2020 (Continued)

~~1:00 p.m. – 5:00 p.m.~~
ACC-

~~MDRT Foundation Satellite Pop Up Booth Open~~

1:00 p.m. – 5:00 p.m.
MP Hall
ACC- Hall D

MAIN PLATFORM SPEAKER REHEARSALS
(for Wednesday MP)

1:30 p.m. – 2:30 p.m.

CORNERSTONE PRESENTATIONS

1:30 p.m. – 2:30 p.m.

CORNERSTONE:

(C, I, J, K, M, S, T)
Presider:

Sam Silverstein

1:30 p.m. – 2:30 p.m.

CORNERSTONE:

Presider:

Esther Perel

3:00 p.m. – 4:00 p.m.
ACC and MA Session Rooms

FOCUS SESSIONS #3

3:00 p.m. – 4:00 p.m.
Presented in: Cantonese

Retirement and Wealth Planning for Baby Boomers
Chee Yen Lim, B.Bus, RFC

Spkr Lsn:
Track: Advising Clients

3:00 p.m. – 4:00 p.m.
Presented in: English

The Exhausted Entrepreneur – The Journey to Health and Wealth
Mark Bryant, MA

Spkr Lsn:
Track: Whole Person

3:00 p.m. – 4:00 p.m.
Presented in: English
Interpreted: J, S

Insurance: Winning Without Dying
Corry Collins, CLU, CHFC

Spkr Lsn:
Track: Advising Clients

3:00 p.m. – 4:00 p.m.
Presented in: English

The Wealth of Confidence – Be Unforgettable
Tracy Hooper
Alice Tang, ChFC

Spkr Lsn:
Track: Marketing

2020 ANNUAL MEETING

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TUESDAY, June 9, 2020 (Continued)

3:00 p.m. – 4:00 p.m.

Presented in: English
Interpreted: C, T

The Scheduling Solution
Gina Pellegrini

Track: Practice Management

3:00 p.m. – 4:00 p.m.

Presented in: English
Interpreted: Hi, K

How to Successfully Manage and Market Your Business
Marc A. Silverman, CFP, ChFC

Spkr Lsn:
Track: Marketing

3:00 p.m. – 4:00 p.m.

Presented in: Hindi

Powerful Mind Setter
Leena Parwani, Cert CII, MBA

Spkr Lsn:
Track: Practice Management

3:00 p.m. – 4:00 p.m.

Presented in: Japanese

Mission and Commitment
Hideki Matsumoto

Spkr Lsn:
Track: Advising Clients

3:00 p.m. – 4:00 p.m.

Presented in: Korean

Retirement Income Solutions
Hyeon Ho Kang
Hwan Sun Park, TLC

Spkr Lsn:
Track: Advising Clients

3:00 p.m. – 4:00 p.m.

Presented in: Mandarin

How to Operate High-Asset Clients to Reach MDRT Lifetime Membership
Shu-Lan Shih

Spkr Lsn:
Track: Marketing

3:00 p.m. – 4:00 p.m.

Presented in: Mandarin

The Way of Four Orders and One Law
Benjamin Xue

Spkr Lsn:
Track: Marketing

3:00 p.m. – 4:00 p.m.

Presented in: Spanish

Get Ready to Reach Your Maximum Potential
Graciela Bottini

Spkr Lsn:
Track: Whole Person

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TUESDAY, June 9, 2020 (Continued)

3:00 p.m. – 4:00 p.m.

Presented in: Thai

Experiences in Presenting Retirement Pension Sales

Panupon Vungvilai, AFP

Spkr Lsn:

Track: Advising Clients

4:00 p.m. – 4:30 p.m.

BREAK

~~4:00 p.m. – 5:00 p.m.~~

~~↳~~

~~Sponsor #2 VIP Reception – Hosted by the MDRT Executive Committee~~

~~(CLOSED EVENT – BY INVITATION)~~

4:30 p.m. – 5:30 p.m.

ACC and MA Session Rooms

FOCUS SESSIONS #4

4:30 p.m. – 5:30 p.m.

Presented in: Cantonese

This is How I Win the Hearts of High-End Clients

Veronica Pang Ching Ching

Spkr Lsn:

Track: Marketing

4:30 p.m. – 5:30 p.m.

Presented in: English

Interpreted: C, S

Think Shift for Personal Best

Michele Gervais, BA

Spkr Lsn:

Track: Practice Management

4:30 p.m. – 5:30 p.m.

Presented in: English

Interpreted: Hi, T

No Boundaries with the Virtual Meeting

Brandon Heckert, AAMS

Spkr Lsn:

Track: Practice Management

4:30 p.m. – 5:30 p.m.

Presented in: English

Building a 50-Year Business

George B. Sigurdson, CLU

Spkr Lsn:

Track: Advising Clients

4:30 p.m. – 5:30 p.m.

Presented in: English

Multiply and Conquer

Micheline Varas, CFU

Spkr Lsn:

Track: Marketing

2020 ANNUAL MEETING

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TUESDAY, June 9, 2020 (Continued)

4:30 p.m. – 5:30 p.m.

Presented in: English
Interpreted: J, K

Dignity Planning: How to Have Clients Call You
Shane E. Westhoelter, AEP, CLU

Spkr Lsn:
Track: Advising Clients

4:30 p.m. – 5:30 p.m.

Presented in: English
Interpreted: M ONLY

The Clock Presentation You Must Know
Timothy Daniel Clairmont, CFP, MSFS

Spkr Lsn:
Track: Advising Clients

4:30 p.m. – 5:30 p.m.

Presented in: Hindi

Unique Marketing Ideas to Sell to High-Net-Worth Clients
Pranil Pramod Bartakke, CFP, MBA

Spkr Lsn:
Track: Advising Clients

4:30 p.m. – 5:30 p.m.

Presented in: Japanese

Be the Advocate of MDRT
Kei Yamasaki

Spkr Lsn:
Track: Whole Person

4:30 p.m. – 5:30 p.m.

Presented in: Korean

Improving Sales Performance Through Mentoring
Kyo Wook Son, CFP

Spkr Lsn:
Track: Practice Management

4:30 p.m. – 5:30 p.m.

Presented in: Mandarin

How to improve the self-awareness and practice of life insurance consultants
Wang Zhan, CFC

Spkr Lsn:
Track: Advising Clients

4:30 p.m. – 5:30 p.m.

Presented in: Spanish

Habits and Systems of a Regular Member of MDRT
Gerardo Alejandro Sanchez Castillo, LUTCF, FSS

Spkr Lsn:
Track: Practice Management

4:30 p.m. – 5:30 p.m.

Presented in: Japanese
Intepreted: T ONLY

What I Learned from MDRT and How I Developed My Business
Yasuhisa Kojima, TLC

Spkr Lsn:
Track: Practice Management

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TUESDAY, June 9, 2020 (Continued)

5:00 p.m. – 6:00 p.m.

HI- Avalon Ballroom
(Lobby Level)

Quarter Century Club

(CLOSED EVENT – Quarter Century Members Only)

5:30 p.m. – 6:30 p.m.

↳

Top of the Table Reception

(CLOSED EVENT – BY INVITATION)

5:30 p.m. – 6:30 p.m.

HI- Pacific Ballroom & Promenade

Appreciation Reception – Hosted by the

MDRT Executive Committee & Past Presidents

(CLOSED EVENT - BY INVITATION)

9:00 p.m. – 11:00 p.m.

PGA Suite

HI- Lanai Presidential Suite #5-230

PGA Best Worker Presentation

OPEN EVENING FOR COMPANY AND NON-MDRT SPONSORED EVENTS

2020 ANNUAL MEETING

June 7 – 10 – ANAHEIM, CA

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4.16.20

WEDNESDAY, June 10, 2020

6:00 a.m.

HI- Executive Ante & Boardroom

PGA Directors Breakfast
(CLOSED EVENT)

6:30 a.m. – 8:00 a.m.

HI-

MDRT Focus Group – TBD
(CLOSED EVENT - BY INVITATION)

7:00 a.m. – 7:30 a.m.

MA- Grand Ballroom EF

Court of the Table Open Forum Rehearsal

7:00 a.m. – 3:00 p.m.

ACC-

Meeting App Kiosk Open

7:00am – 12:00pm

Special Guest Office
ACC- 211AB

Special Guest Office Open Hours

7:30 a.m. – 3:00 p.m.

ACC- Hall C

Registration Open

7:30—7:50 a.m./8:00--8:20 a.m.

ACC and MA Session Rooms

FOCUS SESSION REHEARSALS
(for Wednesday Sessions)

8:00 a.m. – 9:30 a.m.

MA- Grand Ballroom EF

Court of the Table Open Forum
(Ticketed Event – COT Members Only)

Language Tables: **C, J, K, M, S, T**

8:30 a.m. – 3:00 p.m.

ACC- Hall C

ConneXion Zone, MDRT Foundation Booth, & MDRT Store Open
(CZ = No Sessions- Casual Networking Space)

9:00 a.m. – 10:00 a.m.

ACC and MA Session Rooms

FOCUS SESSIONS #5

9:00 a.m. – 10:00 a.m.

Presented in: Cantonese

Continue to be MDRT's Success

Samantha Yin Yuet Sheung

Spkr Lsn:

Track: Practice Management

9:00 a.m. – 10:00 a.m.

Presented in: English

Interpreted: J, K

My Trip to the Top

David William Brown, CLU, CHFC

Spkr Lsn:

Track: Practice Management

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WEDNESDAY, June 10, 2020 (Continued)

9:00 a.m. – 10:00 a.m.

Presented in: English

Addiction and the Role of the Financial Advisor
Cheryl Canzanella, LUTCF

Spkr Lsn:
Track: Whole Person

9:00 a.m. – 10:00 a.m.

Presented in: English
Interpreted: S, T

Discover a Proven Formula for Exponential Growth
Wayne Cotton, CLU

Spkr Lsn:
Track: Advising Clients

9:00 a.m. – 10:00 a.m.

Presented in: English
Interpreted: C, Hi

The Phone Does Ring: Get Introductions from COIs
Paresh B. Shah, CFP

Spkr Lsn:
Track: Marketing

9:00 a.m. – 10:00 a.m.

Presented in: English

Cyber Threat 2020: Cybersecurity Action Planning
John Sileo

Spkr Lsn:
Track: Practice Management

9:00 a.m. – 10:00 a.m.

Presented in: Hindi

Business Through NRI Clients
Prasad Arjun Shirodkar

Spkr Lsn:
Track: Marketing

9:00 a.m. – 10:00 a.m.

Presented in: Japanese

The Story I Shared with my 85-Year-Old Parents and my 30-Year-Old Son

Tamami Okuyama

Spkr Lsn:
Track: Advising Clients

9:00 a.m. – 10:00 a.m.

Presented in: Korean

Differentiate Yourself for Winning Sales

Minho Kong
Sung Man Park

Spkr Lsn:
Track: Advising Clients

9:00 a.m. – 10:00 a.m.

Presented in: Mandarin

The Role of Taxes in High-Net-Worth Individuals

Elton Wang

Spkr Lsn:
Track: Advising Clients

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WEDNESDAY, June 10, 2020 (Continued)

9:00 a.m. – 10:00 a.m.

Presented in: Mandarin

How to Sell High Critical Illness Insurance

Wu Li Zhen

Spkr Lsn:

Track: Advising Clients

9:00 a.m. – 10:00 a.m.

Presented in: Spanish

Your Life is Your Career – Close it With Everything!

Alexandra Llosa del Rio

Spkr Lsn:

Track: Whole Person

9:00 a.m. – 10:00 a.m.

Presented in: Thai

Working with Practices to Reach MDRT

Sakkarin Suwanpaenpa

Spkr Lsn:

Track: Advising Clients

9:30 a.m. – 10:30 a.m.

HI- Avalon Ballroom
(Lobby Level)

Quarter Century Club

(CLOSED EVENT – Quarter Century Members Only)

10:00 a.m. – 10:30 a.m.

BREAK

10:00 a.m. – 11:30 a.m.

MP Hall
ACC- Hall D

Main Platform Speaker Rehearsals

(CLOSED EVENT)

10:30 a.m. – 11:30 a.m.

ACC & MA Session Rooms

FOCUS SESSIONS #6

10:30 a.m. – 11:30 a.m.

Presented in: Cantonese

Be at the Top of the Industry With an Effective System

Joyce Wu Shuk Ping

Spkr Lsn:

Track: Practice Management

10:30 a.m. – 11:30 a.m.

Presented in: English
Interpreted: C, T

Inspiring Wisdom – Ask Tony Gordon

Jennifer A. Borislow, CLU

Tony Gordon

Spkr Lsn:

Track: Marketing

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WEDNESDAY, June 10, 2020 (Continued)

10:30 a.m. – 11:30 a.m.

Presented in: English

How I Sell 250 Life Policies Each Year
Cleophas Castillo

Spkr Lsn:
Track: Advising Clients

10:30 a.m. – 11:30 a.m.

Presented in: English
Interpreted: Hi, S

The Checklist: A Low-Tech Solution Every Advisor Should Use
Dave Faulkner, CFP

Spkr Lsn:
Track: Advising Clients

10:30 a.m. – 11:30 a.m.

Presented in: English

Lead the Pro Football Way
Mark Oristano

Spkr Lsn:
Track: Practice Management

10:30 a.m. – 11:30 a.m.

Presented in: English
Interpreted: J, K

MDRT at the Office, Top of the Table at Home
Adam A. Solano, CRPC

Spkr Lsn:
Track: Whole Person

10:30 a.m. – 11:30 a.m.

Presented in: English
Interpreted: M ONLY

There Are No Secrets to Success
James D. Pittman, CLU, CFP

Spkr Lsn:
Track: Whole Person

10:30 a.m. – 11:30 a.m.

Presented in: Hindi

Life Insurance Profession: A Family Business
Pradip Genbhau Nalawade, CFP, MBA

Spkr Lsn:
Track: Practice Management

10:30 a.m. – 11:30 a.m.

Presented in: Japanese

Time to Change Your Marketing Methods
Masakazu Shigomori, TLC

Spkr Lsn:
Track: Marketing

10:30 a.m. – 11:30 a.m.

Presented in: Korean

Echo Session - Korean Language
Hyoun Pio Park
Jooyoung Yoo

Spkr Lsn: N/A
Track: N/A

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WEDNESDAY, June 10, 2020 (Continued)

10:30 a.m. – 11:30 a.m.

Presented in: Mandarin

How to Run a Personal Brand

Lu Wang

Spkr Lsn:

Track: Marketing

10:30 a.m. – 11:30 a.m.

Presented in: Spanish

Digital Marketing: Trends and Benefits

Tamar Terzakyan

Spkr Lsn:

Track: Marketing

10:30 a.m. – 11:30 a.m.

Presented in: Thai

Echo Session - Thai Language

~~Sanaya Dancharoonkit~~

Chirawadee Hompetch, CFP, MBA

Natthaphat Silsaksom

Spkr Lsn: N/A

Track: N/A

12:00 p.m. – 2:00 p.m.

ACC- Hall C

ConneXion Zone/Sponsor Move-Out

12:30 p.m.

MP Hall (Backstage - Green Room)

ACC- Hall D

MP Speakers Lunch

(CLOSED EVENT)

12:30 p.m.

MP Hall

ACC- Hall D

Main Platform Doors Open

12:30 p.m.

Live Entertainment Begins

1:00 p.m. – 4:00 p.m.

MP Hall

ACC- Hall D

MAIN PLATFORM

Presiders: Peggy Tsai, RFP, CCFP
Regina Bedoya, CLU, ChFC

Presider: Annual Business Meeting
Regina Bedoya, CLU, ChFC

Nominee Acceptance

Recognition of Immediate Past President

Presentation of Foundation Check

BREAK (20 Min)

Back from Break video

Meeting Close & 2021 New Orleans Promo

ADJOURNMENT

2020 ANNUAL MEETING

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