



NAIFA of Springfield
1717 E. Republic Road, Suite A
Springfield, MO 65804
Phone: 417-886-8606

National Association of Insurance and Financial Advisors Springfield

Sales Conference 2008

“Sales Concepts and Strategies for Life and Annuities”

**Don't Miss this rare opportunity to see and learn from
9 of the top financial institutions in the country...
Right here in Springfield, MO!**



When: **March 14th, 2008**

Time: **8:30am—3:30pm** (lunch, snacks and drinks provided)

Location: **Twin Oaks Country Club** - 1020 E. Republic Rd, Springfield, MO

Cost: **Free to NAIFA of Springfield Members** - \$20 Non-Members

Guest Speakers



Bob Bejcek, Milwaukee, WI, Regional Vice President with AIG. Bob oversees the sales and marketing for life and annuities in a 10 state region.



Irv Tang, CLU, Minneapolis, MN, Sales Vice President with ING. Over 19 years of industry experience. Over 7 years in personal sales, 5 years as an Advanced Marketing Consultant and 2 years as Brokerage Manager



Alan Lockhart, Springfield, MO, President of Marketing Financial. Over 22 years of financial experience. Specializing in advanced case design for business, charitable and estate planning.



Bill Friebel, St. Louis, MO, Regional Sales Manager with Oppenheimer Funds. Since 1997, he has held a variety of positions in the financial services industry including financial advisor, district sales manager, and wholesaler. Bill has spent the past 6 years working as a liaison between financial advisors and economists/portfolio managers.



Jim Young, LUTCF, Springfield, MO, President of Target of Springfield. Jim has been in NAIFA for 37 years and was a past president for both MAIFA and SAIFA. Target of Springfield specializes in impaired risk SPIA's and life insurance.



Steve McGaveran, Lenexa, KS, Regional Vice President with AXA Equitable. Steve has been in the financial service industry since 1993. Steve was formerly with DWS Scudder prior to joining **AXA Equitable.** Steve's wholesaling territory includes Missouri and Kansas.

Ken Clark, Denver, CO, Regional Marketing Director for Lincoln Financial. Over 25 years of experience specializing in annuity and life products.



Vicky Schroebel, Boston MA, Vice President and Business Development Specialist at MFS Fund Distributors, Inc. She has 26 years of financial services industry experience. Vicky works closely for MFS key clients, bringing proven, best practice business solutions to advisors and managers across the industry.



Bill Day, Sun Life Financial. Bill was born in Springfield, MO and graduated from Glendale High School in 1988. He was a Registered Representative for Edward Jones 1992 -1995, George K Baum Financial 1995-1999, Jackson National Life 1999-2004 and then Sun Life Financial in 2004 to present.



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Guaranteed to Increase Your Income in 2008!

Important Topics Covered

- **Estate Planning Update**
- **Understanding Indexed Annuities and what they are**
- **The “Living Benefits” of Life Insurance and how to use for Retirement Income**
- **Life Underwriting and How to Deal With the Changes in the Reinsurance Companies**
- **Pension Maximization - Get more out of pension payments why to sell a Life policy**
- **Wealth Transfer - Turn taxable assets into tax-free inheritance through Life Insurance**
- **The ABC’s of Variable Annuities. The living benefits, The death benefits, the power of the tax deferral.**
- **Talking about Identity Theft - A unique idea to bring added value to your current clients and a way to prospect**
- **Underutilized IRA Rollover strategies – Top IRA planning mistakes to avoid – Getting connected, staying connected – Building professional referral networks.**
- **2008 Economic Outlook**

Free 15 Hours CE Online Course for attending



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Registration Form

Due to limited space at Twin Oaks, we will only have room for the **first 150 people who sign up**. Whether you're a member of NAIFA of Springfield or not, you need to reserve a spot by faxing in this form. If not a member, please mail it along with a \$20 check.

Name: _____

Company Represented: _____

Address: _____

Phone: _____

Member of NAIFA of Springfield?: **Yes or No** (circle one)

If “NO”, please mail a check for \$20 to cover our expenses.

If you're a non-member and want to join, this event will be free. *Are you interested in becoming a member?:*

Yes or No (circle one) Someone will contact you.

Members of NAIFA of Springfield

Please fax this form to Jean Harmison at:

(417) 886-3685

Non-Members

Please Mail this form and money to:

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