



MORNING SESSION TOPICS

The New Holistic Advisor

The evolution of retirement planning and advising

The Four Risks of Retirement

Addressing the pains of taxes, market risk, and changing needs

Crafting a New Holistic Strategy

Transforming your practice with IUL

Maximizing IUL's Benefits

Structuring IUL in today's product environment

AFTERNOON SESSION TOPICS

New Holistic Marketing

Attracting new clients and increasing wallet share

Expanding Your Sales Opportunities

Creating a successful client meeting process

Overcoming Objections

Answers to the most common questions

Creating Tomorrow's Success

Translating today's learning into tomorrow's business growth



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