



## DAY 1 TOPICS

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### **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

## DAY 2 TOPICS

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### **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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