



FEBRUARY 20-21, 2025

SESSION TOPICS

THURSDAY | 10:00 AM - 5:00 PM

2025 Legislative Outlook: New Leadership in Washington—And What it Means for U.S. Savers

The "Right" Way for Roth Conversions: Minimizing Taxes and IRMAA for Your Clients

Marketing with Automated Webinars: Hot Topics for 2025

Emerging Income Risks: What's Ahead for the Markets and More

The Rising Tax Risk: And How to Help Your Clients Prepare

FRIDAY | 7:30 AM - NOON

Ask the Actuary: The Latest Developments in Product, Underwriting, and More

Lead Generation 2025: Top Messages to Drive Appointments

The "New Holistic": Combining AUM, Annuities, and IUL to Create Powerful Income Plans

PLUS: Be the first to see Stonewood's NEW Roth Conversion Software debuting at Innovate!



SCAN FOR CONFERENCE DETAILS OR TO REGISTER

