INNOVATE SUMMIT

FEBRUARY 20 & 21

SESSION TOPICS

THURSDAY | 10:00 AM - 5:00 PM

Becoming a New Holistic Advisor: Practice Growth from a New Perspective

5 Pressing Retirement Risks... and How to Build Plans that Overcome Them

Tax & Legislative Risk: Addressing Emerging Threats from Washington

Washington & Your Clients: A Legislative Update

Taxes & the Next Generation: a New Estate Planning Framework

FRIDAY | 7:30 AM - NOON

Market & Income Risk: New Approaches for Asset Allocation

When their Powers Combine... Making Annuities, IUL & Managed Funds Work in Harmony

Message Frames that Convert: Leveraging the Power of Stories

Innovation in Product Design and Pricing: An Actuary's Take

Marketing Strategies to Drive Lead Conversion in 2025 and Beyond

SCAN FOR CONFERENCE DETAILS OR TO REGISTER