

A G E N D A

DALLAS 2024

Time	Topic	Presenter
8:00AM	Breakfast & Registration	Sponsored by Delaware Life
8:45AM	State of the Union at Osaic	Dmitry Goldin (Osaic Wealth)
9:15AM	Multiple contracts wrapped up in one...covering your clients for the unexpected!	Tim Burns (American National)
9:35AM	Behavioral Finance	Danny Francisco (Symetra)
10:20AM	RMD Planning, Capture Wallet Share, and Drive Referrals	Ben McQueen (Liberty One)
10:50AM	Morning Break	
11:00AM	Spring 2024 Product Launch	Eric Holmes (Jackson)
11:30AM	Navigating Your Options in a Time of Need	Roger Cantu (One America)
12:00PM	Lunch	
12:45PM	Understanding Social Security	Mark Berwanger (Protective)
1:45PM	Advisory and WMP	Keith Moore & Peter Maloney (Osaic Wealth)
2:15PM	Afternoon Break	
2:25PM	Succession Planning	Kaffie Latson and Eric Millican (Osaic Wealth and MSF)
2:55PM	Keynote- Estate Planning in the Current Tax Environment	Karen Hofmann (Prudential)