NAIFA Northern California

Advisors Expo

Friday, March 16, 2012 • 8:30 am - 3:15 pm

Garden Pavilion, 5640 Dudley Blvd, (Sacramento) McClellan, CA 95652

Schedule

8:30 am Registration and Breakfast with the Exhibitors

Breakfast sponsored by Blue Shield of California

9:00 am **Dan Allison**

"How to Generate Referrals – Part 1"

Dan Allison, author of "Feedback Marketing," has taken the upscale Insurance and Financial Advisor community by storm. Dan is one of the premier "Upscale Practice" marketing experts in the country and his unique marketing concepts are a perfect addition to EVERY quality advisor's business.

Dan answers such questions as:

- Can I REALLY generate free leads?
- How do I create ongoing introductions to people who can use my services?
- How can I get a steady stream of quality referrals from my clients as well as other advisors?
- Once I meet a CPA, how do I engage with him?

In addition, you'll learn incredibly valuable tools and skills such as:

- Create An Army of Advocates
- Create a Never Ending Source of Prospects
- Learn A New Approach To Gaining Referrals
- Learn The Power of Asking Questions and Gaining Feedback From Your Most Important Relationships

10:00 am Exhibitor Break

10:15 am **Donald McLaughlin, CLU, ChFC, MSM**

"Who Do You Trust?" 1 hr DOI CE credit

"Succession Planning" is a phrase we are hearing more and more as the financial services industry wrestles with approaching retirement of many of its producers.With 40% of U.S. producers planning to retire in less than 10 years, concern is high around this topic. Succession planning is more than just finding a replacement at retirement. It is about maximizing value, increasing your exit options and fulfilling your service commitments to your clients. Contingency, succession and transition planning are critical to completing the entrepreneurial path that successful producers have traveled. Understanding these steps and taking action will enhance the value your practice returns to you and to your clients for the future.

By attending the session, participants will be able to:

- Demonstrate their understanding of the factors affecting their succession planning
- Assess their personal situation and begin the process of creating a personal exit strategy for their practice
- Identify specific solutions that will help participants accomplish their contingency, succession and transition goals.

11:15 am Exhibitor Break

11:45 am Lunch

12:30 pm **Michael Green**

"Maximizing your Memory"

Everything about our lives is wrapped around our memory. Dates, facts, figures, appointments and experiences all play a part in our daily routine. As we age, we begin to struggle with forgetfulness and other memory challenges that leave us feeling like we're losing it. In addition, we are inundated with an increasing amount of information, communications and demands that intensify our memory struggles. When we struggle with our memory, we begin to feel that we are losing productivity, ability to contribute, and precious "non renewable" time.

Do you have to sit by idly and let your memory slip away? No! You can take a proactive approach toward improving your memory. When you decide to enhance your memory skills you take action to improve the quality your life - because enhancing your memory improves work performance, school performance, productivity, family life and more. What is your memory worth to you? Priceless!

Within this dynamic and energizing 60 minute session, you will:

- Test your current memory
- Learn vital memory influencers
- Learn the components improving recall
- Learn a memory technique to enhance your life
- Have fun!

1:30 pm Exhibitor Break

2:00 pm **Dan Allison**

"How to Generate Referrals – Part 2"

3:00 pm Exhibitor Raffle

Registration

or sign-up online at www.naifanorcal.org

Cost: **$60 if paid by February 24th**. $75 if paid after February 24th. Includes continental breakfast and lunch.

Method of Payment:

❑ MC ❑ Visa ❑ Am Exp ❑ Check (payable to NAIFA Nor Cal)

Credit Card #: ____________________

Expiration Date: __________ Billing Zip Code: __________

Card Holder Name: ____________________

Signature: ____________________

Return by March 9th to:

NAIFA Northern California, PO Box 2698, Lodi, CA 95241

(209) 339-4651, Fax (209) 339-8273; info@naifanorcal.org

No refunds. Registration is transferable.

www.naifanorcal.org

Name: ____________________

Company: ____________________

Address: ____________________

City/State/Zip: ____________________

Phone: ____________________

Email: ____________________

2012 Advisors Expo Speakers

Dan Allison is not your typical consultant. Many people rely on academic credentials as evidence of their ability, but Dan also has the practical experience to back it up. With a background in clinical and behavioral psychology, Dan used his knowledge to co-found a mental health company while he was still an undergraduate. The company began as a small, five-employee firm and grew to several hundred employees within a few short years. Much of the growth of his company can be attributed to the same strategies he teaches business professionals through his consulting and public speaking. Dan sold his first company for millions while still in his twenties and has dedicated his career to showing professionals how gaining a better understanding of their clients will lead to an incredible referral relationship. In a few short years, Dan has gone from a virtual unknown to speaking on some of the largest stages in the world. His message is simple: "Your clients are the best consultants for your business, and you need a solid process for engaging your clients in your business and its growth." By using Dan's easy-to-implement strategies, businesses across the country are seeing big improvements in their referral relationships and their bottom line.

Donald A. McLaughlin, CLU, ChFC, MSM – Director, Business Development Principal Financial Group Career Distribution. Don joined Principal Financial Group's Career Distribution in 1999 and has over 30 years of insurance and financial services industry experience both in the field and home office. As Director – Business Development, Don is responsible for providing business continuation, mentoring, succession and transition planning advice, support and information to Principal career producers and field leaders. Don has a background in sales training, marketing and organizational development. He has been active in the industry – NAIFA, American College, GAMA, SFSP and the North America Field Development Association (NAFDA). Don is a CLU, ChFC and has earned a Master of Science Degree in Management (MSM) from The American College. Don has served and chaired LIMRA's Field Development and Productivity committee (twice). He was inducted into the NAFDA(NETDA) Hall of Fame in 1995, 7th inductee in the organization's 50+ year history.

Don has spoken at numerous industry meetings throughout his career. Recently, Don has been a featured speaker on the topic of succession and contingency planning for agents and financial advisors at LIMRA's Sales Force Succession Planning Seminar, LIMRA's Distribution Leaders Round Table (DLRT), GAMA International's Executive Leadership Cabinet and NAIFA state and local chapter meetings from coast to coast. His presentation, "Who Do You Trust?" has been approved for continuing education credit in 43 states to-date. Don has recently authored articles featured in the GAMA International Journal (Jan/Feb 2009) and NAIFA's Advisor Today (August, 2010).

Michael Green is the president and founder of Memory Spring (www.memoryspring.com), a company dedicated to being the leader in enhancing people's memories. He is also the co-founder of Delta-4 (www.delta-4.com), a leadership, teambuilding, and sales training company. In addition, Michael is also an instructor for Cooperative Personnel Services (CPS).

Over the last 15 years Michael has worked with a number of companies including Atlanta Braves, Caltrans, California Department of Consumer Affairs, California Department of Motor Vehicles, Chevron, City of Sacramento, Electronic Arts, Frontier Communications, Houston Rockets, Keenan & Associates, Maloof Sports & Entertainment, MCI, MWH, National Hockey League, Nextel, News10, Pride Industries, Sacramento Rivercats, SureWest, Teichert, UC Davis, URS Corporation, Xerox Corporation and others.

In addition to memory enhancement, Michael has worked with thousands of people on Leadership, Teamwork, Selling, Communication Skills, The Value of Relationships, Selling, and other skills.

Before entering the training industry he spent a decade as the San Francisco North Bay regional vice president for ARCS Mortgage, where he and his branches posted award-winning sales records. Always a popular speaker, he has also served as an area governor and club president for Toastmasters International. Michael is a graduate of California State University, Northridge.