

keep the promise.

2017 insurance leadership forum agenda

thursday, april 20

8:00 am check-in (coffee & juice available)

9:00 opening session

Possibility Thinking: The Slight Edge - Cliff Karthaus, CLU, ChFC, CLF
(sponsored by **Principal Financial Group**)

So many of us learned important life lessons the hard way. Cliff's talk will challenge you to reflect on your own journey with passion & purpose. Cliff, former world class runner & successful financial services executive shares his wisdom from 37 years of disciplined performance. Cliff will demonstrate that challenges & obstacles can become defining moments that help you move forward rather than set limitations.

Cliff joined the Principal Financial Group in 1981 and was appointed Managing Director of the Nebraska Business Center ten years later. Cliff has been honored more times than any other field leader and has received Principal's top honor Grand Trophy four times. At the end of 2014, Cliff stepped down from his duties as Regional Managing Director and now serves as a Leadership Consultant and Executive Coach. Cliff authored and released his first book, "Breaking the Tape," a book on purpose driven leadership, in August of 2016.

10:30 morning break with exhibitors

11:00 concurrent morning sessions

Changes in the Healthcare Marketplace – Russ Gronewald (1 hour HEALTH CE)

The Chief Financial Officer of Bryan Health in Lincoln will provide an update as to how Medicare expansion and the ACA continue to affect hospitals and the healthcare marketplace, and share his expectations for moving forward.

**Protecting Your Profession & Promises Made to Your Clients –
Kevin Mayeux, CAE (1 hour LIFE CE)**

NAIFA's National CEO will bring you up to date on everything NAIFA is doing to protect your business and the clients you serve.

12:00 pm lunch in exhibit hall

1:00 concurrent afternoon sessions

Ethics With Osborne – Tom Osborne (3 hours ETHICS CE and please note:

If you have already met your Ethics requirement, this course will provide 3 hours of GENERAL CE credits that can be applied toward your license renewal!)

Spend the afternoon with perhaps the most trustworthy, ethical, beloved figure in the state of Nebraska! This is a one-time opportunity to hear Coach Osborne talk about ethics in the context of his career in coaching, athletic administration, politics & community service.

Estate Planning for the Modern Family: Case Studies in Life Experiences (3 hours LIFE CE)

This pre-recorded program features a panel of national experts discussing three varieties of the traditional marriage: the blended family (both spouses are divorced; there are children from his first marriage as well as children from their present marriage); the non-US citizen spouse; and the same-sex union couple. The program will highlight the complicated issues these unions create and offer estate planning solutions for today's varied unions between individuals.

ACA Updates From NAHU (3 hours HEALTH CE)

This pre-recorded program block will cover the following: "Wellness Regulations and Making Them Work for Employers" – "HIPAA Phase 2 Audits and SEP Verification Rules" – and "HR Challenges in 2017."

4:00 reception with exhibitors

evening: hospitality rooms

friday, april 21:

7:15 am **prayer breakfast** (hosted by John Gustafson w/speaker Dave Tuzson, \$10 additional fee payable that morning)

8:00 **check-in** (coffee & juice available)

8:30 **concurrent morning sessions**

High Profit Prospecting – Mark Hunter (practice management, no CE for this program)

The quest for leads and prospects is a never ending battle. Some people are quick to blame everything but themselves for their own shortcomings when it comes to prospecting. In his fast paced and engaging style, Mark Hunter (aka “The Sales Hunter”) will have you assessing what you’ve been doing. More importantly, he will equip you with some new prospecting strategies you can use immediately!

With two great books and proven sales methodologies, Mark travels in excess of 200 days per year, not only in the United States, but globally as well. A few of the clients he works with include Salesforce, Lenovo, Mattel, Kawasaki and many more. His first book, “High-Profit Selling: Win the Sale Without Compromising on Price” was released in 2012. His second book, “High-Profit Prospecting”, is now available.

Healthcare Via Trump: Part One – Janet Trautwein (1 hour HEALTH CE)

NAHU’s National CEO will provide an up-to-the-minute look at the details on how our healthcare system might change under the Trump administration. The first hour will touch on new regulations (both issued and proposed), cost trends and how health plans could be affected.

9:30 **concurrent morning sessions**

Social Security & Medicare: Rules, Opportunities and Pitfalls – Mary Beth Franklin, CFP® (1 hour LIFE CE)

Remember the old analogy for the three legs of retirement security: Pensions, Personal Savings and Social Security? The future of retirement is looking much different for most people. Mary Beth Franklin will look at recent changes to rules for some key Social Security claiming strategies, and explain some strategies you can recommend and employ to help your clients maximize their benefits.

Mary Beth Franklin is a contributing editor at InvestmentNews. As a nationally recognized expert in Social Security claiming strategies, she is also a frequent public speaker. With a background as a Capitol Hill reporter and a former retirement and tax editor at a national magazine, Mary Beth writes regularly about the latest research and thought leadership on retirement income planning. She is the author of the book, “Maximizing Your Clients’ Social Security Retirement Benefits.”

Healthcare Via Trump: Part Two – Janet Trautwein (1 hour HEALTH CE)

In this hour, NAHU’s National CEO will provide updates on carriers and the marketplace, changes to entitlements-Medicare-Medicaid; and what is likely to happen to the Affordable Care Act.

10:30 **break**

10:45 **because I said I would – Alex Sheen**

The Forum will conclude with a presentation unlike anything you have ever experienced. Alex Sheen is the Founder of “because I said I would” - the international social movement and nonprofit dedicated to the betterment of humanity through promises made and kept. Sparked by the loss of his father, Alex began sending promise cards to anyone who requested them at no cost. Since his father’s passing in 2012, “because I said I would” has sent over 4.47M promise cards to over 150 countries. Alex’s commitment to the betterment of humanity has inspired millions around the world. The story of his promises have been shared virally throughout social media and international news.

hotel accommodations:

The LaVista Embassy Suites & adjoining Courtyard by Marriott

are holding rooms for Forum attendees, exhibitors & sponsors.

Reservations are first-come, first-served. To ensure you receive the discounted rate, mention the following:

Embassy Suites: **NAHU NAIFA Annual Meeting block** or group code “NA4”. \$146/night (single or double occupancy), \$156/night (triple occupancy), \$166/night (quad occupancy)

Courtyard: **NAHU NAIFA Annual Meeting block** or group code “NAHN”. \$124/night (single or double occupancy)

All rates are subject to room taxes/occupancy fees of 18.13% per night. Check-in time is 3 p.m.; checkout is 12 p.m.

Make your reservation by calling the Embassy Suites at 402-331-7400, the Courtyard at 402-339-4900 or reserve online at: www.naifanbraska.org or www.neahu.org All unreserved rooms will be released on March 30, 2017. You may still be able to reserve rooms after this date at the prevailing rates.