

platinum sponsor:



registration brochure

keep the promise.

2017 insurance leaders forum
april 20-21 - la vista, ne - embassy suites

presented by:



THE meeting for nebraska's top insurance agents & financial services professionals

it's all about the promise.

your promise to your clients:

To provide financial protection and peace of mind.

our promise to you:

To advocate for, protect and help you grow your business.

the 2017 insurance leaders forum promise:

To be the best Conference you've ever attended here in Nebraska!

in fact, we guarantee you will think the 2017 forum is one of the best meetings you've ever attended, period – or we'll refund your money!*

why? because we said we would.

*if, after having paid a registration fee and attended the Forum, you tell us the event was NOT worth your time and money, we will refund 100% of your registration fee.

Featured Speakers:



Alex Sheen is the founder of **because I said I would**, a social movement and nonprofit dedicated to bettering humanity through promises made and kept. Sparked by the loss of his father, Alex and his organization send "promise cards" to anyone anywhere in the world at no cost. Alex will move you to become a better person in both your business and personal life.

The legendary **Tom Osborne** will present a continuing education course on business ethics with stories of the ethical challenges he has faced as a coach, administrator, political candidate and Member of Congress. (limited seating!)

registration form on back or register online at neahu.org or naifanepbraska.org

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.

2017 Insurance Leaders Forum Attendee Registration Form

I am a: NAHU Member NAIFA Member (LOCAL: _____) Non-Member

First/Last Name _____ Industry Designations _____

Company _____ Email _____

Address _____ City _____ State _____ Zip _____

Business Phone _____ Mobile _____

If seeking C.E. Credit, please check State Insurance C.E. needed: Nebraska Iowa

National Producer Number (for C.E. credit) _____

Do you plan to attend the Friday 7:15 AM Prayer Breakfast? (\$10 additional fee payable at the door) YES NO

Registration Fees: Earlybird Registration Deadline: 3/31/17: Member: \$119 Non-Member: \$169
Regular Registration After 3/31/17: Member: \$149 Non-Member: \$199
Single Day Ticket - THURSDAY ONLY: Member: \$89 Non-Member: \$129
Single Day Ticket - FRIDAY ONLY: Member: \$89 Non-Member: \$129

Total Amount Due: \$ _____

Concurrent Sessions (please select one in each time frame — this will help greatly with CE reporting):

Thursday – 11:00 a.m.: Russ Gronewald, CEO of Bryan Hospital in Lincoln, NE: Changes in the Healthcare Marketplace
 Kevin Mayeux, CEO of NAIFA: "Protecting Your Profession & Promises Made to Your Clients"

Thursday – 1:00 p.m.: Health pre-recorded CE program: "ACA Updates From NAHU"
 Life pre-recorded CE program "Estate Planning for the Modern Family"
 Tom Osborne "Ethics With Osborne"

Friday – 8:30 a.m.: Janet Trautwein, CEO of NAHU: "Healthcare via Trump – Part One"
 Mark Hunter: "High Profit Prospecting"

Friday – 9:30 a.m.: Janet Trautwein, CEO of NAHU: "Healthcare via Trump – Part Two"
 Mary Beth Franklin: "Social Security & Medicare: Rules, Opportunities & Pitfalls"

ALL CE courses will provide credit for NE & IA insurance, pending approvals. All CE courses also will provide CEUs for CFP, Legal, CPA & PACE, pending approvals.

Payment Options: VISA Mastercard American Express Discover Paying By Check*

Name on Card _____

Card Number _____ Exp Date _____ Sec Code _____

Billing Address of Card _____

City/State/Zip (of billing address of card) _____

Authorized Signature _____

Email Address For Receipt _____

* Make check payable to NAIFA-NE. Note: When you provide a check as payment, you authorize us to either use information from your check to make a one-time electronic fund transfer from your account or to process the payment as a check transaction. When we process the check, funds may be withdrawn from your account as soon as the same day we receive your payment. You will not receive your check back from your financial institution.

Signed _____ Date _____

Mail completed form to: NAIFA-Nebraska • PO Box 24133 • Omaha, NE 68124

OR FAX TO: 877.355.9226 • **Questions?** Email info@goyellowhouse.com or call Erin at 402-690-1624

Refunds for cancellations before April 1, 2017 may be granted upon written request and decision of conference management, less an administrative fee of \$25. No refunds for cancellations or "no shows" after April 1; however, you may send a substitute.