

# AGENDA

IUL Masters Academy Training | March 5

- 7:30 – 8:30 a.m. Registration & Breakfast
- 8:30 – 8:45 a.m. Why IUL Now?  
*The evolution of retirement planning and advising*
- 8:45 – 9:45 a.m. Solving Your Client's Pain: IUL in Today's Market  
*Addressing the pains of taxes, market risk, and legacy*
- 9:45 – 10:00 a.m. Compliant Conversions  
*Qualifying prospects and funds for the conversion strategy*
- 10:00 – 10:15 a.m. Break
- 10:15 – 11:15 a.m. Evaluating Tax, Income & Risk for Your Clients  
*Incorporating 'tax-free' to create powerful retirement income plans*
- 11:15 – 12:00 p.m. Overcoming Objections  
*Answers to the most common objection*
- 12:00 – 1:00 p.m. Lunch
- 1:00 – 2:00 p.m. From the Actuary: The Mechanics of IUL  
*The nuts and bolts of IUL, from policy loans to case design*
- 2:00 – 2:45 p.m. Prospecting with Today's IUL Story  
*Attracting new clients and new wallet share*
- 2:45 – 3:00 p.m. Break
- 3:00 – 3:45 p.m. The No-Compromise Presentation  
*A powerful story for seminars, workshops and client events*
- 3:45 – 4:15 p.m. Strategies in Action  
*Real outcomes from real clients and advisors*
- 4:15 – 4:30 p.m. Creating Tomorrow's Success  
*Translate today's learning into tomorrow's business growth*
- 4:30 – 5:00 p.m. Questions & Answers  
*Further exploration into the most pressing topics*