

AGENDA

IUL Masters Academy Training | March 10, 2020

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