

SUNDAY

SEPTEMBER 19

6:00 PM Welcome Reception & Dinner at the Agave Terrace & Poolside at Four Seasons

MONDAY

SEPTEMBER 20

7:00 AM Breakfast in Cottonwood & Las Colinas

8:00 AM General Session Begins in Four Seasons Ballroom

Indaba Kickoff

Bill Payne, PRW Wealth Management

OWNER IDEAS: SOPHISTICATED PLANNING FOR WEALTHY CLIENTS AND COMPANIES

Split Dollar to the Rescue of Nonprofit Employers From the New Excise Tax

Tyler Horning, TDC Life

Using the Corporate Checkbook to Fund ILIT Premiums Through Loan Regime Split Dollar

Mark Crites, Crites Insurance Group

IRA Conversion to ILIT - Like a Roth IRA Outside the Taxable Estate

Michael Kentor & Marla McClain, The Kentor Company

Taxes: Pay Them Now, Later or Never? - Yes!

Brian Sak, Granite Harbor Group

DC Update: Real Time Intel on Tax Law Changes

Jeff Ricchetti, Ricchetti Inc.

10:00 AM Break

10:15 AM General Session Resumes in Four Seasons Ballroom

OWNER IDEAS: LESSONS FROM LIONS - TOP PERFORMING FIRMS SHARE THEIR GROWTH SECRETS

Dynamics of Building a Generational Firm: Past, Present, and Future

George Hester, Jason Hester & Chris Tipton, Navitas Wealth Advisors

Staying the Course: Providing Consistency in Uncertain Times

Eric Caisse, Csege Advisory Group

Driving Sales Through Your Mission

Matt Davis & Jake Davis, Oakmont Insurance Group

BOLI Conversations in a Low Rate Environment and Other Solutions for Executives

Scott Richardson, IZALE Financial Group

11:35 AM Shareholder Update / Report to Owners

Bob Carter, Lion Street

12:00 PM Lunch in Cottonwood & Las Colinas

1:00 PM General Session Resumes in Four Seasons Ballroom

OWNER IDEAS: FIRM BUILDING AND MARKETING

The "Mayo Clinic" Firm of the Future

Stephen Miles & Michael Berry, Addicus Risk Management

Beyond Selling: Strategies to Establish a Brand

Hunter Ewing & Bo Wilkins, High Ground Company

Efficiently Building Your Backoffice

George Papanier, AXG Advisors

Finding and Hiring Advisors to Scale Your Firm: The Lion Street Adding Producers Playbook

Kari Gillenwater, Lion Street

MONDAY (CONTINUED)

SEPTEMBER 20

2:00 PM **The Transferable Skills in Your Company**
Glenn Gonzales, Founder & CEO, Jet IT *Brought to us by Randy Rother, Oakmont Group*

2:45 PM Break

3:00 PM General Session Resumes in Four Seasons Ballroom

OWNER IDEAS: GROWTH MARKETS AND NEW REVENUE

Making Annuities Part of Your Practice

Ken Cady, IZALE Financial Group
Jonathan Krueger, LionsGate Advisors
Marla McClain, The Kentor Company

High Limit Disability Coverage for Your Business Clients

Chris Kristian & Gary Terry, The Westport Group
Bill Payne, PRW Wealth Management

Group Benefit Gaps Create Insurance Sales Opportunities

Steven Price, Solenture

4:00 PM **OWNERS ONLY SESSION: THE POWER OF A GOOD STORY**
Randy Perkins, Westview Insurance Services (2019 John Smith Award Winner)

5:30 PM Meeting Adjourns, Followed by Cocktails Outside Four Seasons Ballroom

6:30 PM Open Night

TUESDAY

SEPTEMBER 21

7:00 AM Breakfast in Cottonwood & Las Colinas

8:00 AM General Session Begins in Four Seasons Ballroom

Underwriter Insider: Carrier Programs and Premium Finance Guidelines

Tiffany Hyde, Lion Street

OWNER IDEAS: GETTING BIG HNW AND BUSINESS INSURANCE DEALS DONE

Closing Large Case NQDC Utilizing COLI

Todd Mezrah, Mezrah Consulting

Leveraging Policy Reviews & Dead Money with Premium Finance

Matt Halvorson, Halvorson Company

Just Your "Standard" Term Replacement

Brian Batson, Krupin Partners

Smack Dab in Front of Us: Three Lightning Quick Case Studies

Marc Schechter, Schechter Wealth Strategies

SERP Funding with COLI and Premium Financing

Michael Hamrick, Resilient Risk Management
Coby Harper, TriStar Strategic Group

10:00 AM **THE JOHN SMITH AWARD**

Tax Reform, Product Innovations and Creative Designs: Sales Ideas for the Rest of 2021 and Beyond

Michael Fontanini, Lion Street

11:30 AM Meeting Adjourns