

CONFERENCE AGENDA



Wednesday, October 16th

5:30-7 PM Welcome Reception in the Council Bluffs Room
Hors d'oeuvres and cocktails will be available

Thursday, October 17th

8:30 AM Conference Kick-off and Groundwork
Joe Elsasser

9:30 AM Social Security: Tax Insights, Solvency Discussion Points
Joe Elsasser

10:00 AM Refreshment Break

10:15 AM The EMR Method for Tax-Efficiency in Retirement
Wade Pfau

12:00 PM Lunch Buffet Sponsored by Signal Advisors

1:00 PM Retirement Income Style Awareness (RISA) for Product Considerations
Wade Pfau

2:00 PM Seminar Marketing for the EMR Method
Joe Elsasser

3:00 PM Refreshment Break

3:15 PM Advisor Panel: Marketing and Process
Chris Hasenberg, Kevin Hittinger, Chad White

4:45 PM What's new in software?
Joe Elsasser

5:15 PM Break

6:00 PM Cocktails and Dinner

7:30 PM Brickway Brewery and Distillery Event Sponsored by FocusPoint Solutions

Friday, October 18th

8:00 AM Welcome to Day 2

8:10 AM Sensible Growth
Dana Anspach

9:30 AM Refreshment Break

9:45 AM Medicare with Melinda
Melinda Caughill

11:00 AM Conference Close | What's next?
Joe Elsasser

11:30 AM Conference Adjourns