

**Registration Open...**

**NAIFA-Virginia 2018 Career Conference**

***"Grow Your Business"***

**May 6-7, 2018**

*Featuring...*

*D. Scott Brennan, MDRT Past President & TOT Producer*

*Keith Gillies, NAIFA National President 2018 & TOT Producer*

*David McKnight, Author, Trainer & TOT Producer*

**Dynamic  
Speakers & Sales  
Ideas, Exhibitors,  
Door Prizes &  
More!**



**Continuing  
Education,  
Workshops,  
Legislative  
Forum, Hall of  
Fame Luncheon**

*at the beautiful*

*The Hilton Short Pump Hotel & Spa  
12042 West Broad Street, Richmond, VA 23233*

**Book your room now as we have a limited number of guest rooms in our block. \$139/night Standard King or Double. Call the Hilton Short Pump at 804.364.3600 and mention NAIFA-VA to receive these special rates. Block Cut-off 4/12/18.**

# *NAIFA-Virginia 2018 Career Conference*

## *May 6-7, 2018 ~ Hilton Short Pump*

### **Keynote Speakers**



**Scott Brennan** of South Bend, Indiana is a Past President of the Million Dollar Round Table (MDRT) and is the 2016 recipient of the John Newton Russell Award.

He has been a speaker at more than twelve MDRT meetings, is a member of the Quarter Century Club, and has numerous qualifications for Court of the Table and Top of the Table and is a Legion of Honor Excalibur Knight of the MDRT Foundation.

Scotty is a graduate of Indiana University. He was the South Bend Life Underwriter of the Year in 1994, the Hoosier Life Underwriter of the Year in 1998 and the Indiana MassMutual Agent of the Year in 2002 and 2003. He is a past President of The Forum 400, a member of the Association of Advanced Life Underwriting, a past board member of Life Happens and currently serves as a Trustee on the Indiana Association of Insurance and Financial Advisors Board. In 2011, The Forum 400 gave him their first Humanitarian Award.

He has been a guest lecturer at the MBA programs at the University of Notre Dame and Indiana University-South Bend; and has served on the faculty of The Grant Taggart Symposium in Provo, Utah and The Banff Institute in Banff, Alberta.

Scotty and his wonderful wife, Robin have been married for 32 years and are the proud parents of two adult daughters and two grandsons.



**Keith M Gillies**, CFP, MBA, is the current President of the National Association of Insurance and Financial Advisors (NAIFA) and the Managing Principal of Wealth Solutions, LLC and The Pension Center, LLC, and co-founder of United Wealth Advisors Group, LLC, where he serves as Chief Executive Officer. Keith is a Registered Representative and Investment Advisor Representative with Ameritas Investment Corp., a member of FINRA/SIPC. He is a leading representative of the Ameritas group of companies.

In 2013, Keith was named the Lester A. Rosen Humanitarian Award recipient for his service to his community, profession, and to the greater Ameritas family. In 2016, Keith was inducted into the Ameritas Hall of Fame. Prior to joining the NAIFA National Executive Committee, Keith was elected to two consecutive two-year terms to the National Board of Trustees. He is past-president of both greater NAIFA-Greater New Orleans and NAIFA-Louisiana.

His honors include NAIFA-Greater New Orleans Member of the Year in 1997; NAIFA-Louisiana's President's Award in 2004; and NAIFA-Louisiana's Arthur Abramson Member of the Year Award in 2007. He is also a life and qualifying member of the most prestigious financial services organization in the world, the Million Dollar Round Table with status as a Top of the Table member.



**David McKnight** graduated from Brigham Young University with Honors in 1997. His popular retirement workshop "The Power of Zero" has been seen by thousands of Americans across the country. David's "zero tax" paradigm has been featured in national magazines and is the basis of his #1 Amazon best-selling book "The Power of Zero": How to Get to the 0% Tax Bracket and Transform Your Retirement from Acanthus Publishing. David has trained thousands of financial advisors on his strategies and currently mentors a group of elite advisors from across the country.

David McKnight is a highly regarded speaker who has addressed NAIFA organizations, insurance companies, broker dealers, field marketing organizations, professional societies and radio audiences from coast to coast.

Most recently David was a main platform speaker at Forum 400, an annual gathering of the top 1% of financial advisors in the country. In the summer of 2014, he was a Focus Speaker at the annual world-wide meeting of the Million Dollar Round Table in Toronto, Canada.

David began his career in the financial services industry in 1997 and has since helped put hundreds of people on the road to the 0% tax bracket. David is very involved with his family, church and community. He currently resides in Grafton, Wisconsin with his wife Felice and their seven children.

# NAIFA-VA 2018 Career Conference...

## *"Grow Your Business"*

### Annual Conference ~ May 6-7, 2018

#### Agenda

#### Sunday, May 6<sup>th</sup>

- 11 a.m. – 1:00 p.m. President Elect's Conference
- 1:00 – 6:00 p.m. Registration/ Credentials ~ Registration Desk ~ Exhibitors Set-up
- 1:00 - 5:00 p.m. Continuing Education Courses
- 1-2pm Ethics Scenarios for the Financial Advisor (course #214408 Ethics)
  - 2-3pm The Top 5 Ethical Challenges facing Producers Today (course #217639 Ethics)
  - 3-5pm Medicare Basics (course #217653 L/H)
- 1:00 – 5:00 p.m. Long Term Care Partnership (4) Hour Refresher (course #212856)
- 4:00 p.m. Hotel Check-In ~ Hilton Hotel ~ Front Desk
- 5:00 – 7:00 p.m. **Opening Reception w/ Live Band & Exhibitors ~ Silent Auction Begins**
- 7:00pm Company Dinners (on your own)
- 7:00 – 9:00 p.m. Hospitality Suite (Open to All) ...hosted by LILI Alumni

#### Monday, May 7<sup>th</sup>

- 7:00 – 8:00 a.m. Registration/Credentials – Registration Desk  
**Continental Breakfast with Exhibitors ~ Ballroom V ~ Silent Auction Continues**
- 8:00 – 8:30 a.m. Welcome & Opening Ceremony
- 8:30 – 9:30 a.m. Guest Speaker: D. Scott Brennan "My Shadow Ran Fast" (course#217606 L/H)
- 9:30 – 10:00 a.m. **Break ~ Visits w/ Exhibitors ~ Silent Auction**
- 10:00 – 10:20 a.m. Legislative Forum
- 10:20 – 11:20 a.m. Guest Speaker: David McKnight "The Power of Zero" (course #217605 L/H)
- 11:20 – 11:55 am** **Exhibitor Door Prizes ~ Silent Auction Concludes**  
(Call for Final Bids & Winners Announced)
- 11:55 – 12:00 noon Move to Luncheon
- 12:00 – 12:45 p.m. NAIFA-Virginia Annual Meeting
- 12:40 – 12:45 p.m. Election of Officers ~ State Board Installation
- 12:45 – 1:05 p.m. NAIFA-Virginia Hall of Fame Recognition & 2018 Inductee Announced
- 1:05 – 1:55 p.m. NAIFA National President Keith Gillies
- 1:55 - 2:00p.m. Closing Remarks / Meeting Adjourned



**NAIFA-Virginia 2018 Career Conference**  
*The Hilton Richmond Hotel & Spa (Shortpump)*  
 12042 West Broad Street, Richmond, VA 23233  
 May 6-7, 2018

**INDIVIDUAL REGISTRATION FORM (please print)**

**Early Bird RSVP March 31~ Final RSVP April 30**

Name: \_\_\_\_\_ Nickname for Badge: \_\_\_\_\_ Local Association: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

Spouse/Guest Name: \_\_\_\_\_ Nickname for Badge: \_\_\_\_\_

Address/City/State/Zip Code \_\_\_\_\_

Please register me for the President-Elect's Conference to be held at 12pm on Sunday, May 6<sup>th</sup>, 2018

Please register me for the Delegate Council / Annual Meeting to be held on Monday, May 7<sup>th</sup>, 2018



**REGISTRATION FEES**

| <input checked="" type="checkbox"/> Please Check Box(s) & <input type="radio"/> Circle Rate(s) →  | If paid by March 31 <sup>st</sup>  | After 3/31/18                      |
|---|------------------------------------|------------------------------------|
| <input type="checkbox"/> <b>ALL EVENTS (Sunday &amp; Monday)</b>  | Members \$150<br>Non-Members \$200 | Members \$200<br>Non-Members \$250 |
| <input type="checkbox"/> <b>NON-MEMBER SPOUSE/GUESTS OF REGISTRANTS</b><br>(Sunday Hospitality, Monday Breakfast & Luncheon)                              | \$100                              | \$125                              |
| <input type="checkbox"/> <b>Sunday (One Day) PASS (May 6)</b><br>Includes LTCP and/or Other CE, & Hospitality   | Members \$75<br>Non-Members \$125  | Members \$100<br>Non-Members \$150 |
| <input type="checkbox"/> <b>Monday (One Day) PASS (May 7)</b><br>* Includes Continental Breakfast, Visits with Vendors, Speakers, & Lunch (8:00am-2:30pm) | Members \$95<br>Non-Members \$125  | Members \$125<br>Non-Members \$150 |

**HOTEL REGISTRATION ~ Reservation Procedures ~ Book your room by 4/12/18 to capture the Group Rate**

Arrangements must be made **directly** with the Hilton Hotel by calling 804-364-3600 for these special room rates **by April 12, 2018**. When **making** reservations, state that you are attending the "NAIFA-VA" meeting to ensure the group rate. The special room rates of \$139/night plus tax Standard or Double has been established with the facility for May 4-8. Guaranteed room reservations not cancelled 72 hours before arrival will be charged one night's room and tax. There is also a \$50 early departure fee if the hotel is not notified before or at check-in. Parking is complimentary.

**PAYMENT**

For the Convention Registration, please make checks payable to NAIFA-Virginia. Fees may be charged to MasterCard, Visa or Discover by completing the information below. Cancellation Policy: All fees paid will be refunded provided that written notice is received by NAIFA-Virginia prior to April 6, 2018. Each registrant will settle their own hotel reservation at the end of their stay.

Check one: MasterCard  Visa  Discover

Name on card \_\_\_\_\_ Signature \_\_\_\_\_

Card Number \_\_\_\_\_ Expiration Date \_\_\_\_\_

**TOTAL AMOUNT SUBMITTED: \$ \_\_\_\_\_**

**Mail Form and Payment to:** NAIFA-Virginia, 3108 N. Parham Road, Suite 100-A, Henrico, VA 23294-4415

**E-mail Form with Credit Card Payment to:** [marie@naifa-virginia.org](mailto:marie@naifa-virginia.org)

**FAX Form with Credit Card Payment to:** 804.965.0823 **Questions:** 804.747.6020 ext 101 or ext 111