LifePro University

SEPTEMBER 4, 2024 | CARLSBAD, CA

PRESENTED BY

SIMPLICITY SAN DIEGO

WELCOME TO LifePro University

September is a critical month for the financial services industry. With Life Insurance Awareness Month upon us, the year's end rapidly approaching, and the upcoming holiday season, our team kicks into high gear and works diligently so our families can enjoy valuable time together.

Every year, hundreds of the industry's sharpest financial professionals nationwide journey to San Diego, California in pursuit of world-class insights from industry trailblazers, top financial minds, and high-level executives. Welcome to LifePro University, where we don't just finish the year strong; we redefine what's possible.

This isn't just another conference. This is where the best in the business gather to unlock new levels of potential. You're here because you're driven—because you're hungry for more than just the status quo. You're here to gain the edge, to master the art of turning knowledge into power, and to catapult your business into 2025 with unmatched momentum. Whether it's harnessing the latest in digital marketing, mastering client acquisition, or tapping into cutting-edge technology, today is your day to grab hold of the future.

With just 12 weeks until the Thanksgiving holiday, now is the time to lock in, and we're here to support you on your journey to the top. Imagine the satisfaction of gathering with family for a home-cooked holiday meal, knowing you didn't just coast through the end of the year—you conquered it. So, take a deep breath, dive into today's sessions, and prepare to finish 2024 not just strong, but unstoppable.

MEET THE EXECUTIVE

Leadership Team

Heather Ulz
Principal and Partner

Ben Nevejans
Principal and Partner

Dave Julian
Director of Operations

Sal Mendoza
Vice President, Field Support

Kevin Nuber
Vice President, Field Support

Brian Manderscheid
Vice President
Advanced Case Design

Gabe Lindemann
Director of College Planning
Senior Field Support

Rob Reaburn
Head of Wealth Management

Allee Marchini
Senior Marketing Coordinator

"I'd rather be motivated than anything else."
- Bill Zimmerman, LifePro Founder

SPECIAL THANKS TO

Our Exhibitors

SIMPLICITY GROUP

Allianz

National Life Group®

NORTH AMERICAN® A Sammons Financial Company

SYMETRA® RETIREMENT | BENEFITS | LIFE

PACIFIC LIFE

Nationwide

THE BUCKLEY GROUP PREMIUM FINANCING

OneAmerica℠ Financial

Mutual of Omaha

CREATE AN

Action List

	Significant Idea or Concept	What Clients Would Benefit From This?	What is the First Step?	I Will Complete This First Step By...
#1				
#2				
#3				
#4				
#5				
#6				
#7				
#8				

Welcome to LifePro University!

Ben Nevejans

Principal and Partner, Simplicity Group

Unpredictability has become the new normal in today's world, making the ability to adapt and thrive a determining factor of who sinks or swims. As we reflect on the past year, it's not just about surviving challenging circumstances—it's about mastering them.

In this presentation, Ben Nevejans, Principal and Partner of Simplicity Group, reveals the strategies propelling LifePro and our Elite Advisors to new heights, despite the odds. Ben will take you behind the scenes to explore the innovative approaches and bold moves that have driven remarkable success in the first half of 2024.

About Ben Nevejans

With over two decades of experience in the financial services industry, Ben Nevejans has been pivotal in transforming LifePro into a leader in insurance, annuities, and investments. Upon graduating from Plymouth State University with an Interdisciplinary B.S. in Outdoor Recreation and Business Administration with a minor in communication, Ben relocated to San Diego, CA and soon began his career for Bill Zimmerman and LifePro.

Since then, Ben has been instrumental in LifePro's acquisition by Simplicity Group in 2022, further expanding the company's ability to provide superior service, support, tools, and products to position agents nationwide for success. Ben is recognized as an industry expert and thought leader who contributes to leading publications and several prestigious boards including the National Association of Independent Life Brokerage Agencies (NAILBA) in addition to the Advisory Boards of North American, National Life, and Allianz Life Insurance Company.

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Purpose-Driven Retirement Planning

Joe Jordan

Behavioral Finance Expert, Inspirational Speaker, and Best-Selling Author

In an era of rapid change and uncertainty, financial advisors are called to go beyond the numbers and become life coaches for their clients. In his presentation, Joe will share how to help clients plan not just for a secure financial future, but for a retirement filled with meaning and purpose.

Joe will explore the critical role advisors play in guiding clients through major lifestyle changes and the emotional challenges of retirement. With volatile markets, shifting government policies, and technological evolutions, now is the time to proactively reach out to clients and prospects, build trust, and deliver extraordinary value.

About Joe Jordan

Joe Jordan, inspirational speaker and behavioral finance expert, is the author of the award-winning book *Living a Life of Significance*, which has sold over 150,000 copies in five languages. Formerly, Joe ran insurance sales at Paine Webber and more recently was a senior vice president at MetLife. He was instrumental in developing retail products, launching their fee-based financial planning program, and establishing the behavioral finance department.

Joe is also a founder of the Insured Retirement Institute and has been featured on the cover of Life Insurance Selling Magazine. For three consecutive years, he has been honored by Irish America magazine as one of the "Top 50 Irish Americans on Wall Street." He was inducted into the Fordham Football Hall of Fame and has played rugby for the New York Athletic Club for 30 years.

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Advanced Markets

Andrew Rinn

AVP, Advanced Sales Strategy, Sammons Financial Group

Shifting tax changes, unpredictable economic events, and rapidly evolving regulations are increasing the difficulty and scope of business owners' challenges. This places immense importance on their relationship with their financial professionals as they seek trustworthy information on how to accomplish their goals. This session untangles the confusion and provides clear, concise strategies to transform today's advisors into an indispensable resource for their business owner clients.

About Andrew Rinn

Andrew Rinn brings a wealth of expertise and leadership to his role as Associate Vice President of Advanced Sales Strategy at Sammons® Financial Group, Inc. With a distinguished career spanning multiple decades, Andrew champions the strategic direction for the company's life insurance group, enhancing its presence in the advanced life insurance marketplace. His work focuses on designing, implementing, and continuously refining the strategies and tools driving growth in this competitive sector.

Before joining Sammons Financial Group, Andrew held the position of Vice President of Advanced Solutions and Design at Ameritas, where he was pivotal in shaping the company's approach to advanced markets. His career also includes significant roles at MetLife, Principal Financial Group, and Mutual of Omaha, where he specialized in estate planning. A certified financial planner with designations as a Chartered Life Underwriter (CLU) and Chartered Financial Consultant (ChFC), Andrew is an influential figure in the financial services community. He has served as chapter president of the Des Moines Society of Financial Service Professionals and on the national board of the Society of Financial Service Professionals (SFSP).

NOTES

The #1 New-Client Acquisition Program

San Diego Marketing Team

Simplicity San Diego

The digital world is constantly evolving and staying ahead of the curve is not just an advantage—it's a necessity. The landscape of marketing has shifted dramatically, offering unprecedented opportunities for growth and success. But how do top advisors consistently turn these opportunities into high-value clients? Join us for an eye-opening session revealing the secrets behind a cutting-edge lead generation system with the power to slash advisors' marketing costs by up to 50%.

In this session, the San Diego Marketing Team guides you through LifePro's innovative webinar and seminar platform—designed to maximize your online presence, boost engagement, and convert prospects into lifelong clients. Prepare to transform your marketing efforts and achieve new levels of success with a platform that delivers results.

About the San Diego Marketing Team

The San Diego Marketing team is composed of team lead and Senior Marketing Coordinator, Allee Marchini, and Marketing Coordinators Jaime Ramirez and Brittany Maples. Together, the team collaborates with financial professionals nationwide to deliver relevant and timely materials to their communities by developing creative content and implementing effective communication strategies. Equipped with a wide range of knowledge and skill sets including graphic design, rhetorical writing, social media, email marketing, brand development, data analysis, and more, this dynamic team brings immense value to advisors looking to build, scale, and capitalize.

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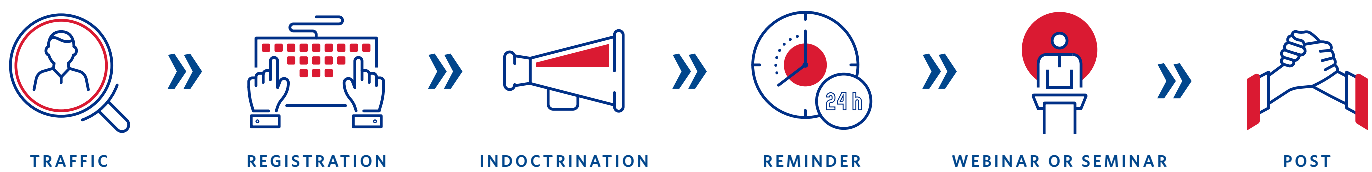
Event Marketing That Will Make You More Money… Not Your FMO!

Discover How to Reach More Qualified Prospects With Targeted Workshops and Webinars During this LIVE, Virtual Conference!



PROVEN RESULTS FROM ADVISORS LIKE YOU

Marketing can be the most important element to your business' success. Learn how top advisors who make $250,000+ are maximizing their ROI with one of the best lead-generation systems in the country.

- Cut your client acquisition **costs in half**!
- **Less than $50**/qualified attendee on average.
- Greatly **improve the quality** of your prospects!
- **Automate your marketing** with a robust CRM system.
- Put **AI to work** for YOU and your business!

Sign up now to secure your spot to the next LIVE webinar:

www.LifePro.com/Event-Marketing

Consumer-friendly video series for financial education and empowerment.

- **Generate more leads and sales** by using videos that focus on critical financial topics like Life Insurance, Annuities, Investments, College Planning, Sales & Marketing, and more.
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Subscribe to the **Money Script Monday** video series today!
www.LifePro.com/msm24

The Hottest IUL On the Market

Corey J. Luke, MBA

AVP, Head of Life Advanced Markets and Business Development, Allianz Life

Staying ahead of product innovation is key to delivering exceptional value and personalized experiences to clients. In this presentation, Corey will provide an in-depth exploration of Allianz's newest product, the Life Accumulator IUL, launched in July.

Corey navigates through the intricacies of this innovative product, focusing on the index and bonus options available. He'll offer insights on how to tailor these options to meet the unique needs of different clients, equipping you with the necessary capabilities to provide the most effective advice. Corey's presentation is a must-attend for those looking to enhance their product knowledge and elevate their client offerings.

About Corey J. Luke

Corey joined Allianz in 2013 and is AVP, Head of Advanced Markets and Business Development for Life Distribution. He leads the Advanced Markets Team and drives efforts to attract Premium Finance, Foreign National, and Advanced Planning Strategy business. Corey also partners closely with our field distribution partners to educate, innovate, and advocate for the products, capabilities, illustrations, and competitive intel needs our market requires to be successful.

Prior to joining Life Distribution in 2024, Corey was AVP over Life Product Innovation at Allianz which was preceded by time at another carrier in similar capacity. Corey earned his BS in Insurance/Risk Management from Bradley University in Peoria, IL and his MBA from St. Cloud State University in St. Cloud, MN. He also holds the Chartered Financial Consultant (CHFC) and Chartered Life Underwriter (CLU) designations from the American College.

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Mastering Asset-Based Long-Term Care Strategies

Don Quante & Javier Allen

Principal, Simplicity Asset-Based LTC and Regional Sales Director, OneAmerica Financial

Between increasing longevity rates and historically high populations of retirees, protecting clients' assets and planning for long-term care are more critical than ever and an expertise in Asset-Based Long-Term Care (ABLTC) strategies can set you apart.

In this presentation, Don and Javier share their extensive knowledge and proven strategies in ABLTC. Backed by decades of collective experience, they provide insights into products and demonstrate tools that can further the exceptional value you deliver to your clients. Don't miss this opportunity to learn the approaches that can elevate your practice to new heights.

About Don Quante & Javier Allen

Don Quante has spent the last 30 years becoming the national go-to expert for crisis long-term care planning and creative pre-planning long-term care strategies. As the Founder and President of MillionDollarAdvisor.com and author of the book *Don't Go Broke in a Nursing Home*, Don is a notable long-term care speaker and trainer who has conducted more than 500 public workshops and trained over 1800 advisors. Additionally, Don has extended his reach by co-hosting a radio show called "Healthy, Wealthy and Wise."

Javier Allen is a dynamic leader in insurance and financial services with over 15 years of industry experience. As Regional Sales Director at OneAmerica Financial, he specializes in Asset-Based Long-Term Care (ABLTC) strategies, offering invaluable insights and guidance to financial professionals. Javier's deep expertise in OneAmerica's Care Solutions and his commitment to exceptional client service make him a standout resource in the field.

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Building a Business in a Trust Recession

Jason Jenkins

Executive Vice President of Sales Training, Simplicity Group

In a competitive landscape where every advisor has access to the same tools and technology, standing out requires more than just working harder—it demands working smarter. As the financial services industry evolves, the ability to capture attention and build trust is vital to success.

In this presentation, Jason Jenkins, a nationally recognized sales trainer and industry legend, shares the advanced sales strategies empowering financial advisors nationwide to elevate their practices from good to exceptional. Jason will dive deep into the proven techniques that have enabled him and countless others to scale their businesses and build lasting client relationships.

About Jason Jenkins

Jason serves as the Executive Vice President of Sales for Simplicity Group, where he directs and oversees the planning, development, and implementation of the Group's sales and marketing strategy. A visionary leader with a deep understanding of the financial services industry, Jason is also at the helm of the continuing development of AssetLock®, Simplicity's proprietary portfolio communication system that has revolutionized client-advisor interactions. Before joining Simplicity, Jason was an independent investment advisor, bringing firsthand experience in building and scaling a successful advisory practice. His background in the industry is complemented by his academic achievements, holding a Master of Business Administration (M.B.A.) from Point Loma Nazarene University and a Bachelor of Arts (B.A.) from Westmont College.

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Ready to take advantage of College Planning Season?

As financial professionals, we help individuals and families achieve a lifetime of financial freedom. One of parents' most significant economic challenges is paying for college without affecting retirement. While many advisors attempt to solve this dilemma, there are only a handful qualified to do so. Two of the world's top college planners, Brian and Ron, will show you how to easily implement college planning into your practice and grow your insurance production by helping a new market desperately in need of your services.

22+ Lessons

Learn from the top two college planners on how to build a profitable insurance practice by offering college planning services.

Marketing Materials

Download all of the resources and tools mentioned in each video including tested invitations and PowerPoint presentations.

100% Exclusive

Instantly gain authority and leverage with this college planning mastery course exclusively available through LifePro.

Sign Up for the College Planning Mastery Course Today!

Visit www.LifePro.com/CPMastery

Simplicity San Diego Directory

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"We are fiercely determined to work for the extraordinary success of our advisors, our employees, and our insurance company partners."

Mission Statement

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