National LINC 2019

Growth agenda

Looking for sessions to help you attract new clients and gather new assets? Here are some suggestions to help you navigate the conference.

Wednesday, February 6

Morning workshop: Putting a price on your value

9:00AM–12:00PM
3 IMCA CE Credits

Do you have a pricing philosophy? If not—or if you think yours might need a refresh—this workshop is for you. We'll walk through the fundamentals of developing your pricing philosophy, the pros and cons of popular approaches, and how to craft a plan to introduce your new pricing strategy to clients and prospects.

Morning workshop: 401(k) sales: How to close more in less time

9:00AM–12:00PM
David Greene, Managing Partner, Greene Consulting
Ross Greene, Founder & CEO, Greene Consulting

Maybe you've only sold a handful of 401(k) plans. Or maybe these plans are a core part of your business. Either way, having a clearly defined, intentional sales approach can help you increase your close rates while spending less time making a sale. Let's dive into the four stages of the sales process - prospecting, engagement, proposal, and presentation/closing - and define what's required to be successful in each.

10 business building ideas for Emerging Advisors

10:10AM–11:00AM
Kate Healy, Managing Director, Generation Next, TD Ameritrade Institutional
Kelly Bradley, Financial Planning Assistant, Trinity-Wealth Management
Alan Moore, Co-Founder & CEO of XY Planning Network
Marjorie Wentz, Retirement Plan Advisor, Trinity-Wealth Management

From working moms to young investors, not only is the investing landscape changing; so is the RIA space. As new advisors emerge, how can we think differently about how to support them and their clients? One idea: Pair up clients with associates in your firm with similar backgrounds. In this session, you'll get tips to strategically build your business and cultivate relationships that are mutually beneficial. #RIANextGen

Showcase session: The New Meaningful Measure: Proving the Value of Relationship

11:20AM–12:10PM
Ron Carson, CEO and Founder of Carson Group
1 CFP CE Credit; 1 IMCA CE Credit

Advisors have long held onto a simple metric for defining their worth in a client's eyes (rate of return, performance, asset growth, etc.). But, are your clients measuring you in more ways than one? They are today. In this keynote presentation, Ron Carson, CEO and founder of Carson Group, will expose the intangible value advisors provide to their clients and illustrate how advisors can bring this invisible value to the forefront of the client conversation. Demonstrating value beyond a doubt is the new standard, and with the advent of interactive technology, Carson will explain what the modern-day consumer expects, why it's changing investor behavior, and how this will influence the profession forever.

Afternoon workshop: Strategies for enhancing your retirement plan service model

1:30PM–4:30PM
Pam O'Rourke, Senior Vice President and Managing Principal, Integrated Retirement
3.5 CFP CE Credits; 3 IMCA CE Credits

Let's take a close look at the increasingly important role that you as an Advisor can play in retirement plans. From choosing which services can bring the most value to plan sponsors and participants to helping plan sponsors understanding their fiduciary duties, you are uniquely equipped to provide the services and education plan sponsors need today. So how do you build your business model to meet these needs?

Thursday, February 7

Propel your business with the TD Ameritrade Retirement Plan

10:30AM–11:20AM
Frank Pitten, Sales Director, TD Ameritrade Institutional
Skip Schweiss, Managing Director, TD Ameritrade Institutional
1 IMCA CE Credit

Looking to activate or accelerate your focus on retirement plans? Join Skip Schweiss and Frank Pitten as they discuss the opportunities in the retirement plan space. You'll also learn how the TD Ameritrade Retirement Plan, the Playbook, and our sales and service teams can help you achieve success.

The modern HSA experience

10:30AM–11:20AM
Shobin Uralil, Co-Founder/COO, Lively, Inc.
1 CFP CE Credit; 1 IMCA CE Credit

Health savings account (HSA) assets have grown 23% year-over-year. Which means there are now over 22 million accounts that encapsulate $45.2 billion in assets. Come discover how you can help your clients take advantage of HSAs to prepare for healthcare costs in retirement while saving money today. We will discuss how HSAs work, their benefits, who qualifies, and how HSA providers are innovating to create a more modern banking and investing experience.

Showcase: A new approach to earning referrals

11:30AM–12:20PM
Dan Allison, Founder, Feedback Marketing Group

Dan Allison is an expert in human behavior and understanding the behavioral element of client referrals. In this presentation, Dan will walk you through the real problem that consumers face in referring the professionals they work with. Then he will show you how to implement simple strategies that will help you start getting referrals right away without ever feeling like a salesperson. Drawing from his background in clinical and behavioral psychology, Dan has interviewed thousands of clients to learn how they want to be approached about referrals. The results are detailed in this popular talk that has been described as “brilliantly simple,” “eye-opening,” and “the most refreshing presentation in years.” Some key take away points you will learn: 1. Why the majority of their clients do not give referrals as frequently as they could. 2. The true roadblocks that prevent most professionals from creating effective referral relationships. 3. How to implement simple, step-by-step strategies to begin getting referrals immediately.

TD Ameritrade Retirement Plan onboarding: An advisor's journey

1:00PM–1:50PM
Jac M. Arbour, President, J.M. Arbour Wealth Management
Zachary Chavira, Institutional Services Relationship Manager, Donaldson Capital Management LLC
Moderator: Frank Pitten, Sales Director, TD Ameritrade Institutional
1 IMCA CE Credit

Ever wonder what the lifecycle of a retirement plan looks like? Get the inside scoop as Frank Pitten leads this in-depth conversation with Advisors on their process from start to finish. They'll cover everything from finding clients, buying criteria for plan sponsors, conducting meetings, and the implementation process.

Improve your firm's marketing in the digital age

1:00 pm–1:50 pm
Michael Byrnes, President, Byrnes Consulting, LLC
1 IMCA CE Credit

Ever feel like you could be more successful when it comes to marketing, particularly when it comes online marketing? The new business landscape has changed, and digital marketing tactics are increasingly important for interacting with current clients and prospects. So come find out what works, and what doesn't. Join this session to get advanced online marketing strategies. The advice will go beyond the basics and provide recommendations that can become the foundation for pursuing your business goals online in 2019 and beyond.

Proven marketing strategies to grow your business

1:00PM–1:50PM
Allison Hillgren – Director of Marketing and Communications, Beacon Pointe Advisors
Edward Kummer – Chief Marketing Officer, United Capital
Karen Lee – Chief Marketing and Strategy Officer, Mercer Advisors
Jud Mackrill – Chief Marketing Officer, Carson Group
1 IMCA CE Credit

Best practices for achieving success in the retirement plan business

2:05PM–2:55PM
Moderator: John Newman, Managing Director, TD Ameritrade Institutional
J. Marcel Louimeus, Senior Retirement Plan Specialist, Majors & Mondragon
Harry Pearson, CEO, Certified Kingdom Advisor®
Brandon Roop, VP of Institutional Services & Sr. Portfolio Manager, Donaldson Capital Management LLC
1 IMCA CE Credit

If you're in the retirement plan business—or want to be—this is a don't-miss session. Listen to fellow Advisors discuss why they entered the retirement plan business and share their best practices. Walk away with actionable insights into retirement plans.

Distributed by: TD Ameritrade, Inc., 200 South 108th Avenue, Omaha, NE 68154.

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