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2023 IARFC VIRTUAL SUMMIT



Join us for the 2023 IARFC Virtual Practice Building Summit September 28 - 29, 2023

This exciting event from the IARFC is an opportunity to glean from industry peer practitioners at the highest levels. You'll have an immediately accretive opportunity to take something, or many things, away from this experience that could be translated into your practice RIGHT AWAY. The presenters will offer insight on a variety of topics from practice management, to best practices, products, platforms, and planning. Each presenter brings decades of experience and insight to the presentation of their breakout session topic. (Each presentation is worth 2 IARFC CE Credit Hours.)

Cost:

\$97 for IARFC Members

\$197 for Non-IARFC Members (Non-members who register for the conference and apply for a designation/credential will receive a **\$197 discount** off the Membership Fee – available through 12/31/23)

REGISTER NOW!



Welcome

David Kinder, RFC®

David Kinder Insurance and Financial Wealth Solutions

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Day 1

12:00 - 12:10 pm	Welcome	David Kinder, RFC®
12:10 - 12:50 pm	Tom Love	Make Life Insurance A Want Rather Than A Need
1:00 - 1:50 pm	Gail Goodman	Intentional Conversations
2:00 - 2:50 pm	Bill Cates, CSP, CPAE	Create Exponential Growth By Multiplying Your Best



Tom Love
The Breakaway League

Make Life Insurance A Want Rather Than A Need

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Gail Goodman
Phone Teacher

Intentional Conversations

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Bill Cates, CSP, CPAE
Referral Coach International and the Cates Academy For Relationship Marketing

Create Exponential Growth by Multiplying Your Best Clients

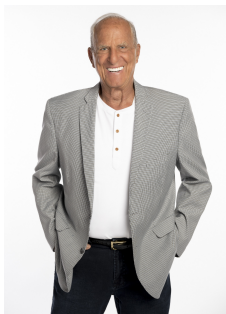
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Kelly Smith Sr., CLU®, ChFC®, RFC®
CapitalSmith Financial and Insurance Services

The New Era of ESOPs

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Joel Weldon
Keynote

Speaking to Grow Your Insurance Practice

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Dr. Sanjay Tolani

Conversation Starters with High-Net-Worth Clientele

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Clients		
3:00 - 3:50 pm	Kelly Smith Sr., CLU®, ChFC®, RFC®	The New Era of ESOPs
4:00 - 5:45 pm	Keynote - Joel Weldon	Speaking to Grow Your Insurance Practice
Day 2		
12:15 - 12:50 pm	Dr. Sanjay Tolani	Conversation Starters with High-Net-Worth Clientele
1:00 - 1:50 pm	Sandy Schussel	4 Steps to a Million Dollar Practice
2:00 - 2:50 pm	Judy Hoberman	Meet the Real Decision Makers and How to Get Them to Say "Yes"
3:00 - 3:50 pm	Arwen Becker	Woman's Market - Tapping into the Largest Wealth Transfer in History (and it's not the one you're thinking of)
4:00 - 4:50 pm	Jeremy Nason, RFC®	The Power of Problem-Focused Sales
5:00 - 7:00 pm	Panel	Arwen, Bill, Gail, Jeremy, Sandy, Judy, Tom

Sponsors



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Sandy Schussel

4 Steps to a Million Dollar Practice

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Judy Hoberman

Judy Hoberman and Associates

***Meet the Real Decision Makers and
How to Get Them to Say "Yes"***

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Arwen Becker



***Tapping into the Largest Wealth
Transfer in History (and it's not the
one you're thinking of)***

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***The Power of Problem-Focused
Sales***

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David H. Kinder, RFC[®]

David Kinder

Host

Biography

David Kinder is a veteran of the insurance and financial services industry. He has served the needs of American residents and business owners, currently as a Financial Consultant with unconventional strategies to help them accomplish their retirement income and wealth accumulation goals.



He studied advanced financial planning through his various studies with The American College of Financial Services. He took private university level courses for over two years and passed over a dozen exams proving his mastery and expertise in financial planning subjects such as investments, retirement planning, income taxation, insurance matters, estate planning, and planning for business owners.

Professional Experience:

- Wells Fargo Bank, N.A.: Personal Banker and Service Manager (2001 - 2004)
- American Express Financial Advisors: Financial Advisor Trainee (2004)
- Wescom Financial Services, LLC: Financial Advisor and Trust Liaison Officer (2005 -

2007)

- MassMutual Financial Group: Financial Advisor and Insurance Agent (2007 - 2009)
- Combined Insurance Company of America: Insurance Agent (2011 - 2012)
- Mutual of Omaha: Insurance Agent (2012)
- David Kinder Insurance and Financial Wealth Solutions: Owner (2007 - present)

Education • Recognition • Licenses:

- Registered Financial Consultant® (RFC®) a professional designation awarded by the International Association of Registered Financial Consultants (IARFC) to those financial consultants who meet the high standards of education, experience, and ethics.
- Ethics Approved Status recognition through the International Association of Registered Financial Consultants (IARFC). Ethics Approved Status means adherence to the IARFC Code of Ethics with a clear record for the past five years. Members are biennially verified through FINRA, state licensing records, internet searches, and are required to pass the Ethics Exam.
- Chartered Financial Consultant (ChFC) advanced financial planning designation from The American College of Financial Services focusing in the areas of financial planning process, insurance, income taxation, retirement planning, investments, and estate planning.
- Chartered Life Underwriter (CLU) is the premier insurance designation from The American College of Financial Services adds additional education and expertise in the areas of individual life insurance, life insurance law, planning for business owners & professionals.
- Recipient of The United States Flag Honor: "At the request of the Honorable Dianne Feinstein, United States Senator, this flag was flown for David H. Kinder, in recognition for the practice and promotion of prudent, qualified, and fiduciary client service and advice in financial services and, commemorating [his] 20 year career anniversary and Advocacy and Promotion of Financial Industry Professional Standards."
- Recipient of The Prudent Man Award: is awarded to the few outstanding financial professionals who have 10 or more years of experience as a true financial planner, and have been recognized by their peers for the practice (or promotion) of Prudent, Qualified, and Responsible Client Service.
- California Life & Annuity, Accident & Health Insurance Producer Resident License (and various non-resident state licenses)
(California Insurance License #0E54187)

Professional Associations:

- International Association of Registered Financial Consultants (IARFC) is a non-profit professional association formed to foster public confidence in the financial services profession, help financial consultants exchange planning techniques, and recognize practitioners who are truly committed to ethical standards and continuous professional education. We simply want the public to have the best financial advice available.

Social Media Industry Influencer & Publications:

- Affectionately known in the insurance and financial services community as "DHK" from Insurance-Forums.net with over 10 years and over 10,000 posts!
- Admin one of the largest financial services discussion groups of its kind on Facebook: Professional Life Agent Insurance Discussion group (only for licensed professionals).
- The Register quarterly publication of the International Association of Registered Financial Consultants (IARFC) (Spring, 2023)
- InvestmentNews: SEC Draws Ire with Indexed Annuity Misstep (August, 2019)
- Insurance Selling Magazine: 25 Reasons to Love Life Insurance (September, 2018)
- Insurance Selling Magazine Inaugural Issue: The InsurTech Revolution (April, 2018)
- Ethics.net: Misrepresentation and Ignorance: A Dangerous Blend for Ethics (August, 2015)



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