

NTSA's 35th Anniversary



Security Benefit is proud to serve as the exclusive Platinum Sponsor of the 2024 NTSA Summit, where leaders and innovators come together to make a difference for clients, the industry, and themselves. We look forward to connecting with you during the Summit and celebrating NTSA's 35th anniversary. Here's where you'll find us:

HIGHLIGHTS FOR MONDAY, FEBRUARY 26

What Women Want in Financial Services: A \$10 Trillion Market

7:00 A.M. | Breakfast Session - Sponsored by Security Benefit

Presented by Brianne Johnson, MBA, RICP®, CFS, National Accounts Manager, Independent Broker- Dealers

Consumers looking for a financial professional to assist them with their retirement savings goals are often daunted by industry jargon and multiple money worries. A recent study Security Benefit undertook with LIMRA underscores that such concerns are particularly prevalent among women.

Join Brianne Johnson, National Accounts Manager, Security Benefit, for a deeper understanding of perceptions women have when it comes to financial services and professional guidance. You'll also learn about the unique challenges women face, and get access to turnkey resources to help you attract and retain female clients.

Get the Meeting No One Else Can: AI and Online Intel Secrets to Find the Right Opportunities Right Now

3:00 P.M. | General Session



Presented by Sam Richter, samrichter.com, Hall of Fame speaker, founder and CEO of SBR Worldwide/Know More and author of the bestselling book, “Take the Cold Out of Cold Calling.”

In today’s world, it’s no longer enough to be interesting. To succeed in sales, you must be interested. What’s important to the other person? How can you hyper-personalize your message so it gets noticed? In this dynamic program, you will discover...

- How to discover the right opportunities and win more business from teachers, administrators, and other decision-makers that others only dream about.
- Jaw-dropping AI tactics for finding online information in ways that 99% never thought possible, using the tools you use every day, so you can connect with prospects and differentiate from your competition.
- Strategies to identify opportunities using money-in-motion events and powerful introductions, so you’re calling on prospects who most likely need your product or solution right now.
- How to transform the “R” in CRM into Relevance, to get past gatekeepers, make a great impression, and use ChatGPT-enabled resources to provide long-term value.

This high-energy, motivating, incredibly high-content program has a huge “WOW” factor – you will be shocked at what you don’t know (but soon will) that you will immediately use to dramatically improve sales performance. All attendees receive custom AI-powered Intel Resources making it easy to implement what was shared.

NTSA at Night

8:00 P.M. | Reception

Sponsored by Security Benefit

Enjoy dinner on your own and meet us back at the hotel for a dessert buffet while you mix and mingle with fellow NTSA attendees!

HIGHLIGHTS FOR TUESDAY, FEBRUARY 27

Keys to Success During the Great Wealth Transfer

10:30 A.M. | General Session

Donald Wiley, VP, National Director of Affinity Relationship Management

Thomas J. Granger, CLU, CPC, REBC, CPFA 2nd VP, Sales Director

In the next 20 - 30 years, as much as \$84.4 trillion from 45 million U.S. households will be passed down from older Americans to their Millennial and Gen X inheritors.¹ Are you prepared to leverage this seismic shift? Or will you lose these accounts upon your client's passing?

Don't wait until the end to try and make a new beginning with your client's family and heirs.

Join Don Wiley and Tom Granger from Security Benefit as they explore the common challenges advisors face. They'll also discuss the role a Stretch/Inherited IRA can play in legacy planning and how they've been impacted by the SECURE Act.

This session will cover how to:

- Help clients and their beneficiaries with the financial portion of their estate plans.
- Leverage Inherited IRAs for beneficiaries.
- Develop relationships with your clients' heirs and connect to different generations.

DROP BY OUR BOOTH!

We look forward to connecting with you at one of our presentations or NTSA at Nite. If you can't make it to one of our breakout or general sessions, we hope you'll swing by our booth!

¹Cerulli Associates, U.S. High-Net-Worth and Ultra-High-Net-Worth Markets 2021

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