

2017 MEMBER SUMMIT | OCTOBER 22–25

WALDORF ASTORIA | ORLANDO, FLORIDA

TO REGISTER: [WWW.VMMEMBERSUMMIT.COM](http://WWW.VMMEMBERSUMMIT.COM)



**VALMARK** MEMBER SUMMIT

Each fall, Valmark hosts a three-day conference called Valmark Member Summit which features several sessions (that have been applied for CE) led by some of the industry's most distinguished speakers. Attendance enables Valmark Member Offices to meet annual FINRA requirements and satisfy annual CE credits for CFP, CPA and insurance designations. Designed as a forum for learning and exchanging innovative ideas and best practices, Valmark Member Summit informs Members about how today's challenges are impacting their practices and clients, and what to expect around the corner. Very importantly, the sessions integrate this information with Valmark's proprietary tools – to provide a curriculum exclusively designed for ValMark Member Offices.

**PAGE 2: BEFORE YOU BOOK, HAVE A LOOK AT SUNDAY**  
**PAGE 3: SESSIONS LISTING & SCHEDULE**

▼ SCROLL DOWN FOR MORE DETAILS.



Quick Start check-in begins at 11:00 am. Guest room check in will be available later Sunday afternoon. While you're checking in, check out the

## RESOURCE CENTER

ValMark Experts will be on hand Sunday 11–5 and throughout the conference. Bring your questions, cases, and ideas.



MEET THE MINDS BEHIND VALMARK'S UNIQUE PROCESSES.

## LET THE GAMES BEGIN

- Tee times will be available all day Sunday on a first-come, first-served basis at the Waldorf's challenging Rees Jones-designed golf course. Later, stop by for a wee bit o' vintage Scottish Golf and more... at the Member Summit Welcome Reception.
- Armchair sports enthusiasts are welcome to enjoy televised sports and refreshments at the Quick Start Check-In and Resource Center area.



▼ KEEP SCROLLING

FEATURED

# PLATFORM SESSIONS

- Keys to Prospering in a New Environment (Panel of Senior Carrier Executives)
- Web Search Secrets to Find More Leads and Land More Business (Sam Richter)
- What Business Are You In? (Mitch Anthony)
- Embrace the Challenge of Life (Inky Johnson)
- Turning Prospects Into Clients (Valmark Member)
- Generating Consistent Referrals (Valmark Member)
- Do's and Don'ts of Working Through Other Professionals (Valmark Member)
- Embrace Being a Fiduciary (Valmark Member)
- 2017 Address to Member Firms (Larry J. Rybka)

FEATURED

# BREAKOUT SESSIONS

- Managing Client Profitability Through Client Segmentation
- Life Insurance 10X: Improving Client Outcomes by 10 Times
- Who, What, Where and When of Comprehensive Planning
- Fixed Income Investing: What You Need to Know in Today's Market
- Life Settlements: Or Let Your Clients' Policies Lapse at Your Own Risk!
- Differentiating Your Insurance Business Using Policy Management
- A Fiduciary Approach to Life and Annuity Sales
- Three Perspectives on Expanding Your Branding Power
- What You Need to Know About Being a 3 (21) Fiduciary

## SCHEDULE AT A GLANCE

	<b>SUNDAY OCTOBER 22</b>	<b>MONDAY OCTOBER 23</b>	<b>TUESDAY OCTOBER 24</b>	<b>WEDNESDAY OCTOBER 25</b>
MORNING	QUICK START CHECK-IN RESOURCE CENTER GOLF TEE TIMES	MAIN PLATFORM SESSIONS	MAIN PLATFORM SESSIONS	DEPARTURES
AFTERNOON	QUICK START CHECK-IN RESOURCE CENTER STUDY GROUPS GOLF TEE TIMES	COMPLIANCE SESSION BREAKOUT SESSIONS RESOURCE CENTER	BREAKOUT SESSIONS NETWORKING RESOURCE CENTER	
EVENING	WELCOME RECEPTION CASINO NIGHT	GLOBAL GIFT FUND DINNER MONDAY NIGHT FOOTBALL	DINE AROUNDS MAHALO MAUI	