

**Amy Florian**

**\$10,000 to \$15,000**

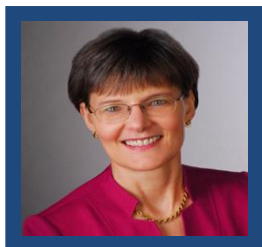
**Teaching Service Professionals to Genuinely Support Clients Through Loss & Transition**

Amy Florian's influence stretches across the Financial Services Industry. Travelling the world to train professionals to effectively support clients in transition, her work shines a light on the widely overlooked topics of grief and loss.

Amy's practical, insightful, and inspirational training is crucial in helping financial professionals do the right thing for clients, retain business across generations, and attract new business from less educated competitors. She draws on the best research and knowledge from the fields of thanatology, neuroscience, sociology, and psychology. An acclaimed speaker and expert, she is the author of over 100 articles and the book "No Longer Awkward: Communicating with Clients through the Toughest Times of Life".

When clients cope with death, divorce, retirement, empty nest, or other life transition, your in-office actions determine whether they stay with you. Amy helps you understand the unique issues that your clients face, the best ways to talk with them in the office, and how to handle their emotions. From her presentations, you will find out how to handle a crying client and whether the stages of grief are applicable. Gain skills to deal with irrational fears, bring humor into meetings, and help clients make wise decisions in the midst of loss. Get practical, proven strategies that you can implement immediately.

Video: [Dealing with Death: Tips for advisors](#)



**Peter Stahl**

**\$5,000 to \$10,000**

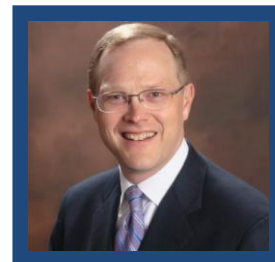
**Equipping Advisors to Handle: Medicare, Long Term Care & Income Solutions for a Health Care Coverage Plan**

Peter understands clients' health care challenges during retirement and equips advisors with the knowledge to build trust and provide solutions. With a seasoned, results driven style, he makes navigation through a complex and ever-changing health care landscape comprehensible to all. He has been a Certified Financial Planner (CFP) since 1997 and also holds the Certified in Long Term Care (CLTC) and Chartered Mutual Fund Counselor (CFMC) designations.

Financial advisors must understand the convergence of financial planning and health care in order to build comprehensive retirement income strategies. Significant demographic, political and legislative changes have occurred in 2016 that necessitate modifications to traditional financial planning strategies. In addition, the competing presidential candidates have varied approaches to retirement health care solutions.

In his presentation, The Convergence of Health Care & Financial Planning, Peter lays out challenges and solutions to accumulation and distribution strategies. His content includes: Estimating Retirement Health Care Costs, Medicare Health Savings Accounts, Custodial Care, Changing Accumulation Strategies, Retirement Income Considerations & Resources for Advisors and Clients.

Video: [The Convergence of Health Care & Financial Planning](#)



**Barbara McVicker**

**\$5,000 to \$10,000**

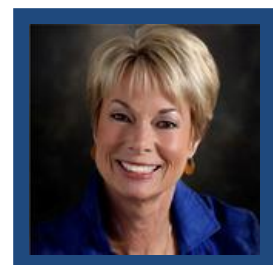
**Helping Financial Professionals Develop and Grow Their Connection to Caregivers**

There are 75 million adult children in this country taking care of aging parents. The Sandwich Generation needs information and solutions to survive the "new" job and role reversal. Barbara McVicker is an eldercare expert, national speaker, author of 3 award winning books, and she recently launched her PBS-TV special Stuck in the Middle: Caring for Mom and Dad.

For 10 years, Barbara looked after her aging parents while raising two children and struggling to maintain her career as a high-level development director. Overwhelmed and feeling isolated, she eventually quit her job to care for her parents full time.

The financial, emotional, and physical impact of caregiving is overwhelming. Recognizing the burden to families is important for understanding the pain, and then providing the cure. This will differentiate your firm from the competition, attract new clients, and grow your business. Barbara's presentation to advisors provides strategies on how to: Build the client relationship, Start the eldercare conversation, Provide solutions and tools for all the stages of life

Video: [Stuck in the Middle: Caring for Mom and Dad](#)



**Jack Broyles**

**\$5,000 to \$10,000**

**The Alzheimer's Tsunami: Equipping Financial Professionals to Better Serve Their Clients**

Jack's goal is to educate advisors so that they are better equipped to help their clients and their families be prepared to fight Alzheimer's disease. He has created a compelling presentation designed to prepare financial advisors, CPA's, CFP's and Insurance professionals to assist their clients, families and friends in creating investment plans and budgets for those diagnosed with Alzheimer's Disease.

Jack also has a passion for the Alzheimer's Associations. After losing his mother to the disease in 2004, he has made educating and serving families affected by the disease and raising awareness for research a major part of his life's work.

FINRA Rule 2111 is concerned with diminished capacity, elder abuse, and the suitability of investment recommendations made by advisors and their firms. Jack's educational program will take you through a step-by-step process that will prepare you to make suitable investment recommendations based on your client's current financial situation, and how to recognize the warning signs of diminished capacity and elder abuse.

Video: [Jack Broyles on Good Morning Texas GMT - Alzheimer's Association Dallas](#)



**Dr. Katy Votava**

**\$5,000 to \$10,000**

**Your Expert on Medicare, The Affordable Care Act and Overall Medical Costs**

It is estimated that 95% of Americans receiving Medicare benefits pay too much for their coverage. How do you, or your loved ones avoid that fate? Dr. Katy provides expert assistance for people looking for un-biased health coverage advice. She created the consulting firm GOODCARE.com® to help financial advisors and their clients all over the United States save money on their healthcare costs.

Dr. Katy is an expert in healthcare and quality improvement, outcomes, including those related to Medicare, home care and long-term care. A major focus of Dr. Katy's research is healthcare costs and outcomes for people during their retirement years.

In her presentation, Long-Term Care & Other Health Care Issues, Dr. Katy focuses on helping advisors help their clients get the most out of retirement by thinking about future health care needs now and what options they have. She provides solutions on how to cut our unnecessary healthcare costs, limit out-of-pocket exposure and to be prepared for any catastrophic expenses that could occur. In return this allows your clients to invest more, minimizes unnecessary decumulation of assets and provides them with a tremendous sense of security.

Video: [Quick Tips for Advisors on Saving Money on Medicare & Long-term care for Their Clients](#)

