



## **NASFA Town Hall Meeting Agenda**

Delta Hotels by Marriott Orlando Lake Buena Vista

12490 Apopka Vineland Road, Orlando FL 32836

Thursday, January 18, 2024

*(agenda subject to change)*

**8:00am – 9:00am Continental Breakfast/Check-in**

**9:00am – 9:15am Welcome and Announcements from NASFA President**

**9:15am – 10:00am Sales & Marketing**

Today's marketing, a discussion among fellow agents to talk about marketing, what strategy is working for you and what is not. Let's share ideas with each other.

**10:30am – 11:15am Life Insurance: Beneficiaries, Tips and Beyond**

Use life insurance as a legacy so at retirement age the insured can spend all their other money to enjoy retirement. Life insurance guarantees funds are available to pay bills until other assets are dispersed. Strategically listing beneficiaries so the goal of the insurance money is achieved. Most agents just list kids names or estate. What if the kids are young and need a guardian. What if the kids are adults and may have a pending divorce or creditors, judgements or liens. What if one of the kids cannot manage money. How to protect money from getting into the wrong hands. Avoid federal and estate taxes by passing the beneficiary tax free.

**11:15am – 12:00pm Myth or Legacy?**

Exploring the myths and truths of the history of NASFA. Believed by some as a union formed by disgruntled agents trying to cause turmoil within the company. Others believe it to be a professional association that was formed by agents for agents. Everything you ever heard or thought about NASFA will be discussed and defined. What is truth and what is myth.

**12:00 pm – 1:00pm Networking Lunch**

**1:00pm – 1:30pm Living with Change**

As agents operating in a wide enterprise, we experience changes at various times and in a variety of ways. This continues to be our objective at NASFA, to be your source for the latest information on what is happening, and how other agents are successful dealing with these changes. Please join NASFA board in our discussion as we share thoughts with fellow agents on the topics of Policy Center and SFPP Migration, and Equipment reliability issues currently being faced.

**1:30pm – 3:00pm Open Forum with NASFA's Legal Counsel**

Questions regarding contracts, insurance regulatory issues, independent contract concerns, and audits. Join the NASFA Board and NASFA Legal Counsel Bob O'Connor as they answer your questions in a Q & A session.

**Adjourn**