

PACIFIC LIFE 2022 TOTAL SOLUTION FORUM

September 19 – 22, 2022

Hyatt Regency Huntington Beach Resort & Spa

Huntington Beach, California

AGENDA

MONDAY, SEPTEMBER 19

All Day

Arrivals

OPTIONAL CE SESSIONS

1:00pm – 2:00pm

Anatomy of a Recession:

What to Look for and Where We're Headed in the U.S. Economy

Reid Coyne, Vice President and Insurance Regional Director, Western Region,
Franklin Templeton

Meeting location: Huntington South

2:15pm – 3:15pm

Identity Theft: Protecting Your Data and Dollars

Liz Young, Vice President, Services & Operations, American Century Investments

Meeting location: Huntington North

3:30pm – 4:30pm

Client Conversations: Today's Inherited IRAs

Michelle O'Haren, Retirement Strategies Consultant, Retirement Solutions
Division

Meeting location: Huntington South

6:00pm – 9:00pm

Welcome Reception

Please join us at the Lighthouse Courtyard at 6:00pm or upon arrival

TUESDAY, SEPTEMBER 20

7:00am – 8:00am

Breakfast – Find Your Region & Connect with your RVP

Lighthouse Courtyard

8:00am – 12:15pm

GENERAL SESSION

Meeting location: Grand Ballroom

8:00am – 8:15am

Welcome

Dawn Behnke, Executive Vice President, Life Division

8:15am – 9:15am

Build Your Life Resume

Jesse Itzler, Entrepreneur, NY Times Bestselling Author, Co-Founder, Marquis
Jets & Zico Coconut Water, Co-Owner, Atlanta Hawks

9:15am – 9:45am

Break

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9:45am – 11:00am

Pacific Life Panel

Darryl Button, President & CEO, Pacific Life

Adrian Griggs, Executive Vice President & Chief Operating Officer, Pacific Life

Dawn Behnke, Executive Vice President, Life Division

Kevin Kennedy, Senior Vice President, Sales & Chief Marketing Officer,
Retirement Solutions Division

Moderator: *Greg Reber, Senior Vice President & Chief Distribution Officer, Life Division*

11:00am – 12:15pm

Methods to Get Your Clients to Take Action – 3 Steps to Winning More Life Insurance Business

Chuck Hollander Jr., Founder, Red Flag Advantage

12:15pm – 1:30pm

Lunch – Find Your Region & Connect with your RVP
Fund Manager Partners Tradeshow

Lighthouse Courtyard

1:30pm – 2:45pm

BREAKOUT SESSIONS

IUL – Illustrated vs Actual Performance

Lewis Tran, Product Marketing Specialist, Product Marketing, Life Division

Riley Thornburgh, Supervisor, Competitive Intelligence, Product Marketing, Life Division

Meeting location: Salon A

Modern Qualified Plans – Reduce Current Income Taxes and Maximize Tax Free Benefits

Scott McHenry, President & Chief Actuary, McHenry Advisers

Meeting location: Salon C

Methods to Get Your Clients to Take Action – 3 Steps to Winning More Life Insurance Business

Chuck Hollander Jr., Founder, Red Flag Advantage

Meeting location: Fountain

The Intergenerational Divide

Michael Velez, Instructional Designer, Franklin Templeton

Meeting location: Driftwood

2:45pm – 3:15pm

Break

3:15pm – 4:30pm

BREAKOUT SESSIONS

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VUL – The Missing Asset Strategy and Illustrate with Confidence

John Church, Product Marketing Specialist, Product Marketing, Life Division

Riley Thornburgh, Supervisor, Competitive Intelligence, Product Marketing, Life Division

Meeting location: Salon A

5 Tips to Successfully Incorporate Business Planning Into Your Practice

Keith Buck, Assistant Vice President, Advanced Designs, Life Division

Meeting location: Fountain

Charting the Underwriting Course – 2022 and Beyond

Susan Ghalili, Senior Vice President & Chief Underwriter, Life Division

Chris Slonecker, Director Affluent Market Strategies, First Horizon Advisors, Inc.

Mario Gonzalez, Financial Advisor, Orbis Wealth Consulting, LLC

Meeting location: Driftwood

RetirementTaxAnalyzer.....the Keys to the Kingdom

Joel H. Solomon, PRS & RTA, Managing Partner, ParadigmGilbert

Meeting location: Salon C

4:30pm – 6:00pm

Fund Manager Partners Tradeshow

6:30pm – 10:00pm

Drive-ins & Diner Dinner

Please join us at the Conference Porte Cochere & Lobby

WEDNESDAY, SEPTEMBER 21

7:00am – 8:00am

Breakfast

Lighthouse Courtyard

8:00am – 12:15pm

GENERAL SESSION

Meeting location: Grand Ballroom

8:00am – 8:15am

Introduction

Greg Reber, Senior Vice President & Chief Distribution Officer, Life Division

8:15am – 9:30am

Rethinking Mental Health: Build Resilience & Support to Optimize Performance

Ben Nemtin, NY Times Best Selling Author & Founder of The Buried Life Movement

9:30am – 9:45am

Break

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9:45am – 11:00am

Economic Outlook

Christina He, Senior Vice President & Deputy CIO Investment Strategy, Pacific Life

11:00am – 12:15pm

Practice Management

Erin Botsford, CFP, The Advisor Authority

12:15pm – 1:30pm

Lunch & Fund Manager Partners Tradeshow

Lighthouse Courtyard

1:30pm – 2:45pm

BREAKOUT SESSIONS

A New Path to Develop Large Premium Business Insurance Cases

Fletcher Brown, Founder & President, Kalamath Consulting Group
Cary Fry, Director, Kalamath Consulting Group

Meeting location: Salon A

The Don'ts, The Do's and The Don'ts of Premium Financing and Life Insurance

Bill Bell, Vice President, Advanced Designs, Life Division
Lindsay Cigler, Consultant, Advanced Designs, Life Division
Michael Rothman, Executive Vice President, Succession Capital Alliance

Meeting location: Driftwood

The "Secret Sauce" Art of Closing High Net Worth Prospects

Erin Botsford, CFP, The Advisor Authority

Meeting location: Salon C

Pacific Life's Best Kept Secret: The High Net Worth Life Program

Matthew Pressler, Assistant Vice President, Corporate and High Net Worth Solutions, Life Division

Andrea Brandon, Director, High Net Worth Solutions, Life Division

Meeting location: Fountain

2:45pm – 3:15pm

Break

3:15pm – 4:30pm

BREAKOUT SESSIONS

Future of Retirement is Lifelong Self-Care

(formerly - Innovative Retirement Offerings to Create Income and Legacy)

Justin Singer, Principal, Retirement Leader, EY

Ben Yahr, Senior Manager, Insurance and Actuarial Advisory Services, EY

Meeting location: Salon A

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Wealth Transfer: Leaving a Legacy

Monica Rhee, Director, Advanced Designs, Life Division

Meeting location: Salon C

AllianceBernstein – Prospecting in an Uncertain Environment

Scott Tatum, Director, AB Advisor Institute

Meeting location: Driftwood

KEAP: Helping Your Clients Recruit, Retain, and Reward Top Talent

Joanne Gagnon, Field Vice President, NQDC Solutions, Life Division

Meeting location: Fountain

4:30pm – 6:00pm

Fund Manager Partners Tradeshow

6:00pm – 9:30pm

WaveFest Beach Party

Please join us at the bridge to the beach

THURSDAY, SEPTEMBER 22

7:00am – 8:00am

Breakfast

Lighthouse Courtyard

8:00am – 10:00am

GENERAL SESSION

Meeting location: Grand Ballroom

8:00am – 8:15am

Opening Remarks

8:15am – 9:15am

American Underdog

Kurt Warner, Former NFL Quarterback & Philanthropist

9:15am – 10:00am

Wrap Up

Dawn Behnke, Executive Vice President, Life Division

10:00am

Departures