



Wealth Watch Advisors  AUGUST 24th - 26th

MOMENTUM

RESORTS WORLD - LAS VEGAS

2022 AGENDA

Prepare to be **challenged, inspired** and **equipped** at this year's Momentum Summit. Plan on arriving between noon and 6:00 PM. Visit the Resorts World reception desk to complete guest check-in.

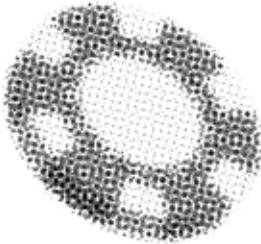
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WED

Welcome to Happy Hour

Enjoy drinks, hors d'oeuvres, and live music at the Rose Terrace.

6:00 PM - 8:00 PM



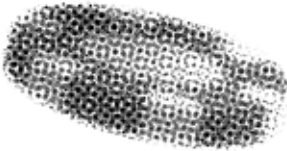
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THUR

Continental Breakfast

Lotus Meeting Rooms 9 & 10

7:00 AM - 8:00 AM



Registration and Welcome

Lily Meeting Room

8:00 AM - 8:15 AM

WWA Introductions, Highlights & Top Advisors Recognition

David Shields, CEO WWA

8:15 AM - 8:30 AM



Howard Capital Management Overview

Hayden Gerwien & Dan Hornbaker, Regional VP HCM

8:30 AM - 9:15 AM

Structured Notes Offerings

Ryan Borer, Fusion Capital

9:15 AM - 9:45 AM



Great American - Fee-based FIA Offerings

Nick Reilly, RVP of RIA Channel

9:45 AM - 10:15 AM



AUG 25th CONT



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THUR

Principal - 529 Plans

Joseph Friedman, 529 Specialist

10:30 AM - 11:00 AM

Morning Break

10:15 AM - 10:30 AM

**Virtual Apex Advisors -
Building A Digital Practice**

Al Caicedo and Aaron Domino,
Principals

11:00 AM - 12:00 PM

Lunch

12:00 PM - 1:00 PM

Taiber Kosmala Overview

Phil Kosmala, Managing Partner

1:00 PM - 1:45 PM

Social Security Workshop Marketing

Tim Dern, AFC Educator

1:45 PM - 2:15 PM

Allianz

Scott Kellen, VP Life Division

2:15 PM - 3:00 PM

Afternoon Break

3:00 PM - 3:15 PM

Redwood RiskFirst® Process

Michael Messinger, Managing Partner

3:15 PM - 4:00 PM

**Nationwide - Fee-based VA and
VUL options for IAR's**

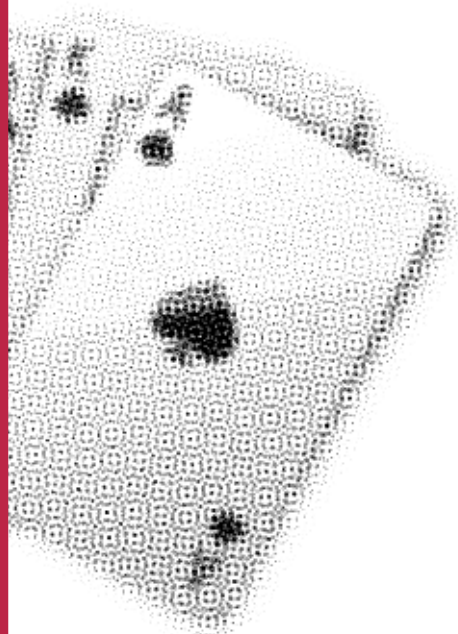
Joshua VanDervort, Life Wholesaler

4:00 PM - 4:30 PM

Kennected

Andrew Ruge and Sterling Curran,
Kennected Sales

4:30 PM - 5:00 PM





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FRI

Continental Breakfast

Lotus Meeting Rooms 9 & 10

7:00 AM - 8:00 AM

WWA Intake Software Overview

Casey Eitler & Taryn Rast

8:00 AM - 8:30 AM

Navigo Wealth Management

Mark Cawyer, President

8:30 AM - 9:00 AM

**Retire Me Right - Education
Marketing Success**

Patrick Lynch, CEO Patrick Lynch
Financial

9:00 AM - 9:30 AM

Using Tools to Build Your Practice

James Jurica

9:30 AM - 10:15 AM

Morning Break

10:15 AM - 10:30 AM

LifeArc and RiskArc Improvements

Mike Wallin, CEO Optivise

10:30 AM - 11:00 AM

Ohio National - Product Overview

Rick Gomez, RVP

11:00 AM - 11:30 AM

Power of Diversification

Bill Gastl, COO WWA

11:30 AM - 12:00 PM

855-822-3708 | support@wealthwatchadvisors.com

8310 South Valley Highway, Suite 107, Englewood, CO 80112