

2021 Virtual Advisor Summit

*The Most Important Sales Meeting
of 2021 Is January 14th & 15th*

**Kick Off 2021 with a Great Sales and Marketing Meeting
Designed to Set Up 2021 To Be Your Best Year Ever.**

Discover the Best Marketing and Sales Firm in America:

- How our in-house advertising agency can create 2400 sales opportunities a year at no cost to you
- How top Advisors are capturing the most lucrative market in 30 years
- Why so many Advisors are switching to the most technologically advanced and best RIA in the industry
- How our 100 unique and powerful marketing tools can position you as the go-to professional in your area
- Why we are the industry innovator and can show you how to thrive in a virtual selling world
- Radio: we will show you how to do it right to drive enormous sales opportunities
- Results: we drive them through our guaranteed marketing programs
- Social Media: will get you recognized

**Join us for the most important sales meeting
of 2021 and kick-off a fantastic year.**

January 14th & 15th | 8am–12pm PST

CLICK TO REGISTER NOW!





2021
Virtual Advisor Summit

January 14th Agenda
8am–12pm PST



8:00 AM

We Are Headed to the Future

Barry Bulakites, President and Chief Strategist, Table Bay Financial

8:30 AM

ABCs of FIAs/Learn from America's Best—Allianz Life

Patrick Butcher, Director of Sales, Allianz Life

9:45 AM

The Biggest Sales Opportunity in 2021/The Stonewood Sales System

Neil Wilding, Vice President, Stonewood Financial

10:30 AM

Breaking into The FIUL Marketplace/Symetra Life

Jeff Wright, CFP, CLU, ChFc RVP Life Sales

11:15 AM

Life Made Easy—Capturing the Big Sales with Key Sales Support

Ian Alsup, Life Sales Relationship Manager

11:30 AM

America's Best RIA—Change Path—Your Financial Journey

Marty Pfannenstiel, President, Sales and Marketing, ChangePath

11:55 AM

Great Today—Better Tomorrow

Barry Bulakites, President and Chief Strategist, Table Bay Financial

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2021
Virtual Advisor Summit

January 15th Agenda
8am–12pm PST



TABLE BAY
FINANCIAL NETWORK

8:00 AM

Why You Belong Here!

Barry Bulakites, President and Chief Strategist, Table Bay Financial

8:05 AM

CPA Direct® America's #1 CPA Alliance Program

Debora Valenciano, Senior Vice President, Table Bay Financial

8:25 AM

America's Tax Solutions® Tax Smart—Financial and Retirement Planning

Koshy P. George, CPA President, America's Tax Solutions®

8:40 AM

How Top Advisors Expand Their Reach with Webinars

Jeff Campbell, SVP National Sales Development, Table Bay Financial

9:00 AM

The SECURE Act and The CARES Act—Impact on Retirement Planning

Denise Appleby, Appleby Retirement Consulting, Inc.

10:15 AM

Marketing Your Way—Increase Sales 200–500% in 2021

Kamala Vanderkolk, Director of Marketing, Table Bay Financial

10:45 AM

A View from The Summit—Interview with Table Bay's Advisor of the Year

Hailey Peterson, VP and Chief Counsel, Table Bay Financial

11:15 AM

10 Reasons 2021 Can Be Your Career Year

Joe Brady, Director Sales Development, Table Bay Financial

11:45 AM

A Team of Experts—You Are Not Alone

Barry Bulakites, President and Chief Strategist, Table Bay Financial

12:00 PM

Let's Get Busy!

CLICK TO REGISTER NOW!