COW College 2022

AGENDA

(Register Now: moneytrax.com/cowcollege)

Wednesday, January 5th

10 a.m.	**Onsite Check-in** VIP In-Person Attendees come get your All-Access VIP Badge, Conference Gift & your Conference Brochure	VIP In-Person
10:30 a.m.	**Foundation for Success with Circle of Wealth®** Learn the steps successful Trusted Advisors incorporate into their client meetings: - A repeatable process that helps your clients take action - A system that explains and proves your strategy - Coaching that gives you knowledge and conviction - A community that shares and cultivates ideas" *With Starr Barnum & Crystal Langdon*	VIP In-Person
1 p.m.	**Embracing Financial Uncertainties in '22 & Beyond** Welcome to COW: Managing real-world events and current affairs; a consistent approach in an ever-changing financial landscape. As the world changes around you, the Circle of Wealth® system provides advisors consistency in the midst of change – your financial compass to always know true north *With Don Blanton, Beatrice Schultz & Jeremy Shipp*	Main Stage/All
2 p.m.	**Practical Power of the PEM** For the first time, your prospects and clients will be able to "see" what you know, not just "hear" what you say. *With Starr Barnum, Don Blanton & Matt Rzepka*	Main Stage/All
3 p.m.	**Uncovering New Opportunities w/the Annual Review** This important step is missed by so many advisors. It's an opportunity to reinforce your philosophy, review what you put into place and how it fits into your client's big picture plan. It will reassure your client that you care, and oftentimes reveal new opportunities. *With Fred Hicks, Beatrice Schultz & Beth Walker*	Main Stage/All
4 p.m.	**COW Tool Time & Marketing with Education** Get equipped for your next conversation. See the new 2022 tools including custom presentations you can use to market via educational seminars. *With Jeff Hopper, Jeremy Shipp, Crystal Langdon & Rick McClanahan*	Main Stage/All
5 p.m.	**Networking Reception**	VIP In-person

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Thursday, January 6th

8:30 a.m.	**Networking Breakfast**	VIP In-person
9:30 a.m.	**Interactive Advanced Case Study** Balancing alternative investing with the need for a private reserve strategy. Learn how to show your clients how they can support their yellow tank activity with a green tank. *Coach Led Group Discussion*	VIP In-person
11:30 a.m.	**Ask Me Anything Lunch** Interactive session during lunch to ask Don Buddy any question and hear his answer in real time. *With Don Blanton*	VIP In-person
1 p.m.	**Belief Changers** Discover the software's hidden gems that make your conversations more efficient. These insights will demonstrate your expertise and change your clients' beliefs. *With Starr Barnum, Don Blanton & Beth Walker*	Main Stage/All
2 p.m.	**Being "In" Debt vs. Having "A" Liability** Develop convictions that debts derail your clients' future, but liabilities may empower them. With Harlan Accola, Beatrice Schultz, Jeremy Shipp & Beth Walker	Main Stage/All
3 p.m.	**Tax Mastery: Perception vs. Reality** Is it better to follow the typical tax advice or should you pay the tax today? Learn how to help your clients understand how taxes really work, address their common misconceptions, and help them plan for today and tomorrow. *With Matt Rzepka & Jeremy Shipp*	Main Stage/All
4 p.m.	**Live Case Breakdown #1** Monday morning quarterback: Review a live client case to see how the Circle of Wealth® 10-step process unfolds. Our Executive Coaches will highlight key statements and provide commentary. *With Starr Barnum, Don Blanton, Beatrice Schultz & Jeremy Shipp*	Main Stage/All
5 p.m.	**Partner Socials**	VIP In-person

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Friday, January 7th

8:30 a.m.	**Networking Breakfast**	VIP In-person
9:30 a.m.	**Discover Uncommon Money** Understand the benefits of 72(t), Roth conversion strategies, reverse mortgage opportunities, and backdoor IRA -- potential risks and rewards. Look past traditional resources to find the money. Get creative and expand your mindset so you can help maximize your client's resources. *Coach Led Group Discussion*	VIP In-person
11:30 a.m.	**Ask Me Anything Lunch** Interactive session during lunch to ask Don Buddy any question and hear his answer in real time. *With Don Blanton*	VIP In-person
1 p.m.	**Navigating a Lifetime of Major Capital Purchases** How would you like to pay for it? You finance everything you buy! Demonstrate the importance of liquidity, use and control; access to capital; and uninterrupted compounding interest so your clients make informed buying decisions. *With Fred Hicks, Beatrice Schultz & Beth Walker*	Main Stage/All
2 p.m.	**Designing Life Insurance that Delivers** Build the policy that matches your advice by making sure you are picking the club that enhances your client's swing. Review the key components of a policy and how to analyze and build your illustration. Optimize the changes of 7702 and the power of maximum efficient policy. *With Starr Barnum, Matt Rzepka, Jeremy Shipp*	Main Stage/All
3 p.m.	**The Impact of a Consistent Message** Get perspective from the founder of the Circle of Wealth®. *With Don Blanton*	Main Stage/All
4 p.m.	**Live Case Breakdown #2** Monday morning quarterback: Review a live client case to see how the Circle of Wealth® 10-step process unfolds. Our Executive Coaches will highlight key statements and provide commentary. *With Starr Barnum, Don Blanton, Matt Rzepka & Jeremy Shipp*	Main Stage/All
5 p.m.	**Inspiration for '22 & Next Steps**	Main Stage/All