



SECURITY BENEFIT

ADVISORCONNECT

Our Advisor Connect program was designed with these goals in mind:

- To upgrade an advisor's ability to effectively deliver value to their clients,
- To clearly differentiate an advisor's practice from their competition, and
- To help your advisors grow their businesses across multiple client segments



FINANCIAL PROFESSIONAL USE ONLY

WHAT MAKES OUR PROGRAM DIFFERENT?

Through a combination of product innovation, exceptional investment management, and a unique distribution strategy, Security Benefit has become a leader in the U.S. retirement industry.

Our partnership with respected industry leaders, experts, and visionaries is based on our more than 50 years of expertise in the retirement market and our knowledge that the real value of a great speaker and relevant topics is what an advisor can do with the information once the experience is over. Our Advisor Connect program can help your advisors put what they've learned to work as soon as they return to the office.

Here are just a few of the ways we can help your advisors apply new ideas, strategies or best practices to grow their book of business:

- Deliver tools and resources that focus on the **How** to build a successful practice and not just the **Why**
- Provide dedicated wholesaler support from our Sales Team to reinforce the speaker's message and deliver value to clients
- Follow through with additional training and resources such as webinars, videos, and calls to further ensure your advisors are able to take action and grow their businesses



RIGHT OUTCOME | RIGHT PROGRAM | RIGHT SPEAKER

● **Advanced Markets**

Financial advisors operating in advanced markets require expertise in complex financial strategies, including tax-efficient wealth transfer, business succession planning, and sophisticated investment solutions. Speakers in this category provide insights on navigating high-net-worth client needs, regulatory challenges, and cutting-edge financial instruments to drive client success.

● **Practice Management**

Effective practice management is essential for advisors to streamline operations, enhance client engagement, and scale their business. Expert speakers offer strategies on workflow optimization, team development, and technology integration to improve efficiency and long-term profitability.

● **Peak Performance**

Achieving peak performance as a financial advisor requires mastering the mindset, habits, and strategies that lead to sustained success. Speakers in this space deliver actionable insights on time management, goal setting, and high-performance psychology to help advisors maximize productivity and client impact.



Bob Hartnett



With over 40 years at the Social Security Administration, Bob is one of the nation's foremost authorities on Social Security and Medicare benefits. Having conducted over 2,000 workshops, Bob translates complicated government programs into easy-to-understand strategies for financial advisors and their clients. Now the principal of Hartnett Consulting, he provides in-depth guidance on maximizing Social Security benefits, debunking myths, and navigating Medicare's complexities. His engaging presentations empower professionals with the tools needed to help clients make informed, financially sound decisions.

Bob collaborates with financial advisors, retirement planners, and estate attorneys looking to enhance their expertise in Social Security, Medicare enrollment, and maximizing benefits. His sessions provide tactical strategies and real-world applications.

Programs

- Biggest Myths About Social Security
- Social Security – What Every Woman Should Know
- Is Social Security Going Broke?
- Welcome to Medicare

Tom Hegna



A recognized authority on retirement planning, Tom is a leading economist, keynote speaker, and best-selling author known for breaking down complex financial concepts into simple, actionable strategies. As a former First Vice President at New York Life and a retired Lieutenant Colonel, Tom has delivered over 5,000 seminars on his signature "Paychecks and Playchecks" approach, helping Baby Boomers and retirees create sustainable lifetime income. His books, including *Don't Worry, Retire Happy!*, provide a roadmap to retirement security, making him a go-to expert for financial professionals seeking to optimize their clients' retirement strategies.

Tom works with financial advisors, wealth managers, and insurance professionals seeking to improve their expertise in retirement income solutions, annuities, and client retention.

Programs

- Paychecks and Playchecks – Retirement Solutions for Life
- Don't Worry, Retire Happy! – Seven Steps to Retirement Security
- Retirement Alpha – How Mortality Credits Improve Retirement Outcomes

Videos

- [The Retirement Income Expert](#)
- [2022 Economic Commentary](#)

Moshe Milevsky, Ph.D.



Millennia ago, pension annuities were paid with bread and wine. A century from now they might be in Bitcoin or some other form of currency. From obscure tontines to contemporary DIAs, Moshe will examine the assorted ways in which members of society have insured themselves against the high and unanticipated cost of living longer than expected. He will also deliver a practical framework for how to think about modern insurance and financial product solutions.

Moshe is a Professor of Business Finance & Graduate Faculty of Mathematics, York University in Toronto and has delivered more than 2,000 keynote presentations around the world.

Program

- The Past, Present, and Future of Longevity Risk Pooling

Heather Schreiber



Heather specializes in turning complex retirement tax strategies into understandable, actionable concepts that empower financial professionals. Her 30+ years of experience in the industry provides technical retirement planning education, advanced case design, and expert training to help advisors take a solutions-driven approach with their clients.

In today's rapidly evolving market, keeping up with changing regulations and tax laws can be overwhelming. Heather's expertise ensures financial professionals stay ahead to mitigate retirement risks, navigate Social Security intricacies, and optimize tax-efficient income strategies – all while enhancing client relationships and retention.

As the founder of HLS Retirement Consulting, Heather partners with advisors nationwide, providing behind-the-scenes support and advanced planning strategies. Her passion for consumer advocacy and financial literacy drives her mission to help advisors empower their clients and build lasting financial security.

Programs

- 5 Critical Social Security Concepts Every Advisor Should Know
- Operation Decode – Answering Top Tax-Related Annuity Questions
- Operation Roth

Videos

[Retirement Consulting](#)

[Rollovers vs. Transfer – Avoiding Costly Mistakes](#)

[Why was my client told they can't collect the widower's benefit?](#)

Peter Stahl, CFP®, CLTC®, CMFC®



Healthcare costs in retirement can have a profound emotional and financial impact on your clients. Financial advisors have a unique opportunity to build trust, strengthen multi-generational relationships, and enhance financial plans by addressing this critical topic.

With over 30 years of experience in the financial services industry, Peter helps advisors navigate the complexities of retirement healthcare planning, equipping them with the knowledge and tools to create comprehensive and effective wealth strategies. His engaging and results-driven approach simplifies an ever-changing healthcare landscape, making it understandable and actionable for both advisors and their clients.

Peter is a Certified Financial Planner (CFP®) and holds Certified in Long-Term Care (CLTC®) and Chartered Mutual Fund Counselor (CMFC®) designations. He earned degrees in Economics and Business Administration from Gordon College and has built a career delivering training and sales resources to advisors across domestic and international markets.

Program

- The Convergence of Health Care & Financial Planning for 2025 and Beyond

Video

[Peter Stahl](#)

PRACTICE MANAGEMENT

Erin Botsford



From humble beginnings to Barron's Top 100 Advisor, Erin has built a multi-million-dollar financial services firm and now teaches other advisors how to replicate her success. With her proprietary Lifestyle Driven Investing™ approach, Erin has revolutionized risk management and high-net-worth client acquisition. Her engaging presentations reveal proven methods for scaling a financial practice, attracting premium clients, and creating a business that grows itself.

Erin works with financial advisors, investment firms, and insurance professionals looking to grow their practice, attract premium clients, and create sustainable revenue models. Her coaching and speaking engagements provide proven strategies for rapid growth.

Programs

- 5 Keys to Building the Business of Your Dreams
- "Secret Sauce" to Closing High Net Worth Prospects at the First Meeting
- 9 Ways to Bring in More Clients in Less Time with Less Money
- Prospecting and Practice Building – Three-Part Program

Videos

[Crisis Conquered – 5 Action Steps](#)
[5 Secrets Every Advisor Needs to Know](#)
[Going to "Mastery"](#)

Sandro Forte



A top financial advisor and international speaker, Sandro is recognized for his high-performance coaching and business growth strategies. As the author of *Dare to Be Different*, Sandro has influenced over one million advisors across 88 countries, sharing insights on prospecting, client retention, and high-net-worth engagement. With a career spanning decades of industry leadership, Sandro’s motivational presentations blend practical business strategies with personal development, empowering financial professionals to elevate their success and build sustainable, thriving practices.

Sandro collaborates with financial professionals, sales teams, and investment firms seeking to increase revenue, build client trust, and scale their business effectively.

Programs

- Be The Best You Can Be – 6 Steps to Success
- Dare to Be Different
- Building a Better Business – Three-part Program

Videos

- [Sandro Forte’s Promo](#)
- [Top Tips from a Top Advisor \(Virtual\)](#)

Joe Jordan



A former MetLife Senior VP and insurance sales leader, Joe is a globally recognized behavioral finance expert and the author of the award-winning book *Living a Life of Significance*. With a mission to help advisors shift from transactions to meaningful client relationships, Joe delivers high-impact presentations on retirement security, trust-building, and purpose-driven financial planning. Having spoken to over 400,000 financial professionals across 28 countries, Joe’s insights inspire advisors to connect emotionally and ethically with their clients.

Joe collaborates with financial advisors, wealth managers, insurance professionals, and financial firms seeking to improve client engagement, trust-building, and purpose-driven financial planning. His insights help professionals integrate behavioral finance, enhance advisor motivation, and develop holistic retirement strategies that prioritize both financial security and personal fulfillment.

Programs

- Purpose Driven Retirement Planning
- Living a Life of Significance

Videos

- [Your Purpose as A Financial Professional](#)
- [Living a Life of Significance](#)
- [Joe Jordan’s Personal Story](#)

Sarano Kelley



A #1-rated speaker on Wall Street, Sarano is a financial industry thought leader known for his proven techniques in client acquisition, referral generation, and business growth. As the founder of The Kelley Group, Sarano has developed innovative coaching programs that have transformed financial professionals' ability to attract prospects, retain clients, and increase managed assets. His accountability-based coaching model has been adopted by elite firms, making him a sought-after speaker and trainer for those looking to scale their businesses effectively.

Sarano partners with financial advisors, firm executives, and leadership teams looking for scalable business strategies. His keynote speeches, coaching programs, and workshops offer proven frameworks for long-term success.

Programs

- Authentic Communication Series for Client Acquisition and Growth
- Run Your Business Like a CEO – From Solo Practitioner to Mega Team
- Cracking the COI Code
- Recruiting for Leaders

Videos

- [Speaker Video for Managers](#)
- [Authentic Communication](#)
- [The Game of Business Development](#)

Dennis Moseley-Williams



One of the only two certified Experience Economy experts in financial services, Dennis helps firms shift from transactional client service to experience-driven engagement. By applying behavioral finance and customer experience principles, he guides advisors in creating meaningful, referral-generating relationships. His thought-provoking keynotes explore how financial professionals can differentiate themselves, enhance client loyalty, and drive growth through tailored client experiences.

Dennis works with financial advisors, business owners, and corporate leaders looking to differentiate their brand and elevate client experiences. His sessions provide real-world applications of behavioral finance and customer engagement strategies.

Programs

- Build Belonging – Services to Membership Experience
- Serious Shift – From Advisor to Advocate
- More Than Welcome – Implementing the Experience Economy in Client Onboarding
- Elevating Client Experience – Blueprint for Advisor Success (three-hour workshop)

Videos

- [Dennis – My Story](#)
- [The Experience Economy Rewards Us for Being Awesome](#)

Optimal AdvisorAI

Optimal AdvisorAI specializes in making artificial intelligence practical and accessible for financial advisors, helping them save time, enhance client engagement, and drive business growth. Through hands-on training, workshops, and consulting, they provide professionals with real-world AI applications tailored to the finance industry. Their expertise ensures that advisors stay ahead in an evolving landscape, leveraging AI to optimize workflows while maintaining compliance and personal connections. Their sessions offer a clear roadmap for AI adoption, transforming the way advisors interact with clients and manage their practices.

They partner with financial advisors, investment firms, and wealth management professionals to leverage AI for efficiency, compliance, and client engagement.

Program

- How Financial Professionals Can Use AI to Save Time and Drive Growth



Lance Cibik



Lance is a keynote speaker, performance coach, and author who has turned adversity into purpose and success in both life and business. Despite facing significant challenges, he uses his experiences to inspire others.

In his powerful presentations, Lance explores how adversity can shape our lives, drive purpose, and lead to success. His captivating stories motivate audiences to see challenges as opportunities for personal and professional growth. He can also help his audience learn that communicating effectively is a critical skill for success in any field – whether you’re a seasoned presenter or novice speaker.

Programs

- Adversity Fuels Your Purpose, Impact, and Success
- Command Attention – Mastering Communication and Presentation Skills

Stephen Drum



A retired Navy SEAL Master Chief, Stephen brings over 27 years of experience in elite military leadership and training to the corporate world. As a resilience and performance expert, Stephen teaches professionals how to thrive under pressure, adapt to change, and execute with confidence in high-stakes situations. His “Perform on the X” methodology helps individuals develop mental toughness, strategic decision-making, and leadership excellence in both personal and professional settings.

Stephen partners with corporate leaders, financial professionals, sales teams, and high-performance organizations looking to enhance resilience, leadership, and decision-making under pressure. His dynamic keynotes and workshops equip teams with battle-tested strategies for adaptability, mental toughness, and peak performance in demanding environments.

Program

- Perform on the X

Videos

[Stephen Drum Story Reel](#)

[Performing on the X](#)

Dr. Kevin Elko



A renowned sports and business performance coach, Dr. Elko has worked with NFL teams, Fortune 500 companies, and elite financial professionals to instill mental toughness, resilience, and goal-setting strategies. As a best-selling author and keynote speaker, Dr. Elko’s high-energy sessions focus on developing a winning mindset, enhancing leadership skills, and optimizing performance in high-stakes environments. His insights empower individuals to break through barriers and achieve peak success.

Dr. Elko collaborates with corporate leaders, financial professionals, and sales teams seeking to enhance performance, resilience, and leadership effectiveness.

Programs

- The Exceptional Advisor – Key Lessons from Top Performers
- The Greatness Standard – Be Bold
- The Genetics of Greatness – from Surviving to Thriving
- I’m Strong If You’re Strong – Leadership

Video

[Kevin Elko Clip: The Top Performance Consultant shares success secrets](#)

Dr. Rick Jensen



Dr. Jensen is a prominent performance coach, sports psychologist, and author. And in the financial services industry, has consulted with top firms, coached hundreds of financial advising teams and trained managers at all levels. As a brand ambassador, he shares his expertise to help firms promote their products and services.

Dr. Jensen is the author of *Drive to the Top: 5 Timeless Business Lessons Learned from Golf's Greatest Champions* and *Easier Said Than Done: The Undeniable, Tour-Tested Truths You Must Know (and Apply) to Finally Play to Your Potential on the Golf Course*. He has appeared on ABC, ESPN, CNN, and the Golf Channel and writes for Golf Digest and GOLF Magazine. He has worked with the PGA of America, the U.S. Olympic Training Center, and the Golf Channel Academy. Dr. Jensen holds a Ph.D. in Psychology with a focus on Sport Psychology and Exercise Science.

Programs

- Disciplines of Growth – How Top Producers Consistently Acquire New Clients and New Assets
- Motivating Clients to Take Action
- Running Your Business Instead of It Running You – Management Strategies

Video

[Dr. Rick Jensen – Sample Presentation](#)

Dr. Kevin McGarry



Dr. McGarry is an author and expert in leadership with over 30 years of experience in the financial services industry and is known for his talks on leadership, team engagement, and managing different generations in the workplace. He is the founder of McGarry Leadership and CEO of Leading 360, a global leadership organization and has held other important roles, including National Sales Manager at both Nationwide Mutual Funds and Symetra Annuities, and notable positions at AllianceBernstein and MFS Sub-Advisory Services.

Dr. McGarry's book *Lead with Purpose* shares valuable insights on effective leadership in today's fast-changing business world.

Programs

- Mindset for Leading Clients
- Leading Multi-Generational Teams – Strategies for Today's Leaders

Video

[Dr. Kevin McGarry – Short Speaker Reel](#)

Medal of Honor

Freedom ... it's not free. We live in the land of the free because of the brave. Our freedom was created and is preserved because 42 million brave souls throughout our history put on the uniforms of the Army, Navy, Air Force, Marines and Coast Guard to ensure we can live our lives as we want to – free to make our own choices. Many of these men and women made the ultimate sacrifice in this quest.

Using an interview format with Robert Jerome as moderator, a limited number of the recipients of our nation's highest award for valor in combat, the Medal of Honor, will be made available to share stories and thoughts in a presentation guaranteed to be a memorable experience, regardless of whether those in attendance have any personal affiliation with the military. In addition to the presentation, Medal of Honor recipients will sign autographs and stand for pictures to further enhance and personalize the experience of meeting one or more of our National Treasures.

Program

- Honoring Those Who Made Us and Keep Us Free

On Target Living

Founded on the principle that health is the key to peak performance, On Target Living delivers transformational strategies to improve energy, focus, and overall well-being. Their “REST – EAT – MOVE” methodology empowers professionals to optimize their health, reduce stress, and enhance productivity. Through engaging workshops and actionable insights, On Target Living helps individuals and organizations achieve sustainable performance improvements that drive success.

On Target Living partners with corporate teams, financial professionals, and high-performance organizations looking to improve well-being, reduce stress, and enhance overall productivity. Their dynamic keynotes and workshops provide sustainable health strategies that empower individuals to perform at their best in both work and life.

Programs

- The Power of Feeling Your BEST – Health is Wealth
- Capacity – The Performance Secret That is Overlooked
- Quieting the Mind
- The Power of Sleep

Videos

[You Have the Power to Feel Your Best](#)

[Connecting Health + Business = Wealth!](#)

We're here to help your clients *To and Through Retirement*[®].

Contact us a 800.747.5164, option 3, or visit
SecurityBenefit.com/financial-professionals/sales-help to learn more.

FINANCIAL PROFESSIONAL USE ONLY

Annuities are issued by Security Benefit Life Insurance Company in all states except New York.

Services through **Security Distributors**, a subsidiary of SBL which is wholly owned by SBL Holdings, Inc. (Security Benefit).



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