**Report name:** NAIFA 2015 Exhibitor List
**Report date:** Friday 03/29/2024
**Event name:** NAIFA 2015 Booth Reservation
**Total records:** 68 records

| Exhibitor Company | Booth number/ref | Exhibitor Website | Company Description |
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| 3-Mentors | 213 | http://www.3-mentors.com/ | 3-Mentors is an annuity and life insurance Field Marketing Organization leader built for producers by producers. Founded and led by three active top-producing financial professionals — Gary Reed, David Gaylor, and Rodney Harris — the 3-Mentors team is dedicated to helping independent insurance and financial professionals navigate challenges, serve their clients, and grow their businesses. |
| Advisor Today | 419 | www.advisortoday.com | Founded in 1906 as Life Association News, Advisor Today is the official publication of the National Association of Insurance and Financial Advisors. Our mission is to provide practical information, sales ideas and business strategies to help insurance and financial advisors succeed. |
| Advisors Assistant | 506 | www.AdvisorsAssistant.com | Advisors Assistant – The Leader in Client Management Software for the financial services industry since 1985. It increases sales, helps build strong relationships, and streamlines office efficiency. Advisors Assistant makes it easy to stay in touch with clients and prospects on a regular basis to build rapport and keep them from straying to other advisors. Add the Optional Insurance and Commission Modules or the Optional Investment Module to track investments. Choose either Web Based or Computer Based – We Have Both! FREE 800 Line Support, Updates, & Training. SPECIAL DISCOUNT for NAIFA Members. (800) 799-4267 www.AdvisorsAssistant.com |
| Ameritas Life Insurance Corp. | 119 | www.MakingDIEasier.com | We make insurance EASIER for you and |

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| | | | your clients! Specializing in DI, life insurance and more, we partner with producers to help them find new buckets of money for their agencies. With nationwide DI discounts available and high/low dental and vision options beginning at 3 lives, we focus on making the process simpler for you, whether you work with individuals, small groups and/or major corporations! The group division of Ameritas Life Insurance Corp. has served customers since 1959 and today provides dental, vision and hearing care products and services, insuring or administering benefits for more than 6 million people nationwide. To learn more about Ameritas, visit ameritas.com or ameritasinsight.com. |
| APPS/Portamedic | 306 | appslive.com | APPS and Portamedic are now #1! We are very excited to be combining two industry leaders in service, coverage and technology. Together, we look forward to providing our customers with un-paralleled quality, turn-around time, and responsiveness for all of their paramedical needs. APPS and Portamedic have developed a well-earned reputation for excellent customer service, attention to detail, and delivery of industry leading technology. Please visit our website at appslive.com to find one of the 100 APPS/Portamedic branches that are nearest to you. |
| Ash Brokerage | 718 | www.ashbrokerage.com | Ash Brokerage helps advisors and their clients protect those they care about in impactful, meaningful ways. We are driven & focused on helping our advisors get to that next level in their professional lives or bring the passion back into their businesses. Our nationwide team of more than 300 industry experts is committed to investigating, analyzing and comparing products and sales concepts. This |

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| | | | unprecedented level of care with hands-on experience ensures advisors receive the right solutions for their clients as well as an unbiased and objective analysis of their clients' insurance needs. |
| Brookstone Capital Management | 215 | www.brookstonecm.com | Brookstone Capital Management has created an investment approach that emphasizes risk-managed portfolios designed to meet the specific needs and risk tolerance of their clients. This approach is based on using varied strategies to help minimize downside risk. While each strategy has its own methodology, the main goal is to avoid large-scale losses. The belief is that diversification across multiple risk-controlled strategies help manage wealth for both performance and protection. |
| CalSurance Associates | 200 | www.calsurance.com | As a leading insurance broker, CalSurance Associates has over 50 years of experience delivering comprehensive insurance products, exceptional service, and proven results to over 150,000 insureds. Our goal is to provide cost-effective insurance solutions that reduce risk, mitigate loss, and deliver comprehensive protection. |
| CAS Inc | 403 | www.cas-online.com | Since 1981, we've established ourselves as one of Direct Marketing's most innovative companies offering mailing lists, opt-in email marketing, data append, telephone append, and customer database hygiene / privacy update services. |
| Charles Schwab & Co., Inc. | 207 | www.schwab.com/franchise | Schwab Independent Branch Services (IBS) offers an innovative franchise opportunity for experienced financial advisors to operate and grow their own business, with the infrastructure, support and brand power of Schwab behind them. |
| Citrix ShareFile | 202 | www.sharefile.com | Citrix ShareFile is a file-sharing tool that helps people exchange large files easily, securely and professionally. Built specifically for business, ShareFile offers |

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| | | | security for data transfer and storage, customized usage and branding solutions, award-winning customer service, and mobile apps and tools that allow you to easily access and share files from any device—anytime, anywhere. |
| College for Financial Planning | 201 | www.cffpinfo.com | The LUTCF® is back! A completely redesigned curriculum has been created based on extensive industry research conducted by The College for Financial Planning and in collaboration with NAIFA and the nation's leading Insurers and their trainers. The College created the CERTIFIED FINANCIAL PLANNER™ (CFP®) certification, is the exclusive provider of 10 industry benchmark designations, and remains the premier provider of education to those in investment advisory and planning roles in the financial services industry. |
| Consultus | 412 | www.ConsultusNow.com | CONSULTUS We teach successful, independent financial advisors how to build full-service, fee-based financial consulting practices using turn-key automated systems. We push-feed their pipeline by providing more than 90% of their clients (affluent), full training and complete back-office support and technology to automate their practice. We also offer more than 50 carriers, top compensation, full benefits, and multiple six-figure residual income. Financing may be available. Come to our “BOOST,” visit Booth #412. |
| Copytalk, LLC | 607 | www.copytalk.com | Copytalk's Mobile Scribe service makes documenting all your important information faster and easier than ever before. Pick up your phone, dial Copytalk, and dictate the details of your meeting, your to do list, reminders, drafts of email, or any other information you want to capture. You can also take advantage of our mobile application for the same at-your-fingertips |

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| | | | dictation on your smartphone or other mobile devices. Within a few hours, we deliver your transcribed text via email, secure download, or through automatic integration into many popular CRMs. |
| DST-LTM (Let's Talk Money) | 115 | www.letstalkmoney.com | DST's Let's Talk Money communications program can help you stay in touch and build relationships with clients and prospects. Choose from a series of customized, client-contact newsletters designed to get your message out and your sales in. Our FINRA-reviewed, turnkey newsletter offers valuable life insurance and financial service content relevant to your customers and prospects. Available in three delivery formats and eight versions, Let's Talk Money helps you stay top-of-mind for life changing events and establishes you as the go-to financial professional. For more information, visit us at www.letsmoney.com or call 800.243.5234. |
| Ed Slott and Company, LLC | 203 | www.irahelp.com | We are the nation's leading educators and purveyors of accurate, timely IRA expertise and analysis to financial advisors and consumers across the country. We educate financial advisors on the complexities of IRAs so they are better equipped to navigate their clients through the tax and distribution planning necessary to achieve financial security. We provide various training programs and educational resources, including our 2-Day IRA Workshop, our eSeminar Series training program and Ed Slott's IRA Advisor monthly newsletter. |
| Enterprise Rent-A-Car | 206 | enterprise.com | Founded in 1957 and known for an extensive network of locations, affordable rates and outstanding customer service, Enterprise Rent-A-Car is an internationally recognized brand that was ranked on BusinessWeek magazine's annual list of "Customer Service Champs" for four years |

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| | | | in a row. With more than 5,500 offices located within 15 miles of 90 percent of the U.S. population, Enterprise operates as a key provider for insurance replacement. Collision repair centers use Enterprise Rent-A-Car's exclusive ARMS® Automotive Suite of Products to facilitate communications with insurance companies and customers. Visit us at booth 206 to learn more today. |
| ExamFX | 113 | www.examfx.com | ExamFX is the leading national prelicensing provider for the Insurance and Financial Services industry. Our course library includes Series 6, 63, 65, 66, 7, 24, 26, Life, Health, Property, Casualty, and many others. Our highly-predictive practice exams are the most state-specific available and are designed to simulate actual testing environments. Our content is supported by cutting-edge online tools, including live instructor-led webinars, online flash cards, online video instruction, virtual study calendars, and mobile apps. Visit our website for details on our 100% Money Back Guarantee for students who do not pass their licensing exam on the 1st attempt! |
| Examination Management Services, Inc. | 702 | www.emsinet.com | Examination Management Services, Inc. (EMSI) is the market leader in medical information services, helping clients make informed decisions and improve the lives of those they serve. Building on over 40 years of unwavering commitment, EMSI provides its insurance services customers with leading-edge medical record retrieval services, paramedical examinations, electronic application fulfillment services and more. For details, contact us at 800.530.0560, ext. 3337 or Examination Management Services, Inc. (EMSI) is the market leader in medical information services, helping clients make informed |

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| | | | decisions and improve the lives of those they serve. Building on over 40 years of unwavering commitment, EMSI provides its insurance services customers with leading-edge medical record retrieval services, paramedical examinations, electronic application fulfillment services and more. For details, contact us at 800.530.0560, ext. 3337 or insurancesales@emsinet.com. |
| ExamOne | 101 | www.examone.com | ExamOne is committed to ensuring the underwriting requirement process is quick and convenient for applicants, agents and home-office personnel. Our services include data gathering, paramedical examinations, laboratory testing and consultative analytics, designed to assist life insurance companies in fair, objective evaluations on mortality risks of applicants. |
| Federal Benefits Advocates, LLC | 613 | http://www.federalbenefitsadvocates.com | Federal Benefit Advocates, LLC (FBA) offers educational services to insurance agents and financial advisers through the FedSmart Adviser Training Program to assist them in better understanding all of the employee benefits offered by the Federal government to its employees and how to market to them. FBA also created the FedWise Employee Benefits Seminar Program that can provide advisers and agents with flexible ways to offer benefits information to groups of Federal employees in an educational setting – which helps advisers in developing more leads in this market, in less time. |
| Fujitsu Computer Products of America, Inc. | 402 | us.fujitsu.com/scansnap | Fujitsu is an established leader in the document imaging market, featuring state-of-the-art scanning solutions. These scanners deliver speed, image quality and superior paper handling to optimize business processes. If you’re looking for a small and simple scanning solution, our ScanSnap mobile scanners bring productivity and efficiency to the home |

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| | | | office and small business organizations with just one touch of a button. This family of scanners come in a compact size for convenient travel use and affordability. Check out our ScanSnap iX series scanners that come with built-in Wi-Fi, duplex multi-sheet scanning and has dramatically improved speed and image quality for best-in-class performance. |
| Futurity First | 714 | http://www.meetfuturity.com/ | Our unique business model offers the flexibility to meet the needs of all types of advisors, at every stage of their career. With access to our broker-dealer, ProEquities, and top insurance carriers, Futurity advisors are able to provide independent planning strategies and recommendations to their clients. With an unparalleled choice of product and investment solutions, all backed by experts in marketing, training and comprehensive back-office support, Futurity First gives advisors the support they need to succeed. |
| Gateway Brokerage | 407 | www.GFAinvestments.com | Gateway provides support to independent associates in securities, fixed insurance and multiline services. For all of your securities, insurance auto, home and commercial needs, Gateway is the independent brokerage firm for you. |
| Glenn Llopis Group | 614 | www.glennllopis.com | Glenn Llopis Group is a nationally recognized thought-leadership, human capital, and business strategy consulting firm whose product and service offerings for Fortune 500 and 1000 clients as well as entrepreneurs include leadership and talent development, business strategy, preparing leadership for the cultural demographic shift, content marketing, branding, communications, and workplace culture transformation. Glenn is the best-selling author of the book, Earning Serendipity and contributing writer to Harvard Business Review, Forbes, and Huffington Post. In |

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| | | | 2014, he was recognized as a top 20 influential writer at Forbes and a top 100 leadership speaker and business thinker by Inc. Magazine. |
| Guardian Life | 313 | | The Guardian Life Insurance Company - Locally represented by Iron Horse Financial. For over 150 years, Guardian has helped protect millions of individuals, families and businesses with insurance and other financial products, due in part to the company's solid performance and disciplined investment philosophy. This philosophy delivers stable performance, even in turbulent times. With a large network of experienced financial representatives representing The Guardian Network, we know what being accountable means. Each member of the Network strives to uphold our collective reputation as a premier financial services provider, while helping make a difference in our clients' life. |
| HANCOCK BROKERAGE, LLC | 218 | www.hancockbrokerage.net | We work with producers that want a competitive edge when brokering their Life, Annuity, Disability and Long Term Care cases. The extensive resources that Hancock Brokerage extends to their producers makes for a powerful combination. We are an equity partner with AIMCOR and this alignment provides powerful carrier relationships and dedicated resources. We excel at negotiating underwriting offers and strategizing product solutions. If you want to partner with a team of individuals who demonstrate a superior work ethic and offers world class service, reach out to us today! |
| HealthPlan Services | 314 | www.healthplan.com | HealthPlan Services is the nation's largest independent provider of sales, benefits administration, retention, public and private exchange connectivity to the insurance industry. Since 1970, HPS has offered customized services to insurers of |

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| | | | individual, small group, voluntary and association plans, as well as valuable solutions to thousands of brokers and agents. Headquartered in Tampa, Florida, HPS employs nearly 3,000 associates to provide administration for over 6 million members while supporting over 9,000 agents. HealthPlan Services' latest technology innovation, MyConsumerLink, is a customizable exchange platform for agents, distribution partners and associations. |
| Illinois Mutual | 107 | www.illinoismutual.com | Illinois Mutual helps people achieve and safeguard their financial security by providing competitive Disability Income Insurance, Life Insurance and Workplace Insurance solutions. For more than 100 years, we have focused on delivering the best personal service to our policyowners and distribution partners with respect and integrity. To learn more about our company values, please visit www.IllinoisMutual.com. |
| Impact Technologies Group, Inc | 503 | www.impact-tech.com | Financial Planning Software Development and Sales |
| Insurance News Net.com | 301 | insurancenewsnet.com | As the industry's No.1 media source, InsuranceNewsNet exists to inform and inspire insurance and financial professionals by delivering the industry's most comprehensive news, original insights and valuable education. From award-winning editorial and design to results-oriented marketing and strategy, everything we do is focused on helping agents run their practice and increase their bottom line. INN Brands: www.insurancenewsnet.com www.annuitynews.com www.healthinsurancenewsnet.com www.insurancenewsnetmagazine.com |
| Kansas City Life Insurance Company | 413 | www.kclife.com | Since 1895, Kansas City Life has been dedicated to the present and future financial |

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| | | | security of its customers. With more than 2,500 general agents and agents serving 48 states and the District of Columbia, Kansas City Life serves individuals, families, small business and corporations with universal life, term life, whole life, variable life insurance, variable annuities, fixed annuities and a diverse range of group products. The Company and its subsidiaries provide financial services including insurance, annuities and investments. |
| Kaplan Financial Education | 103 | www.kaplanprofesional.com | Kaplan Financial Education is a leading global provider of financial education and exam prep products. We've helped hundreds of thousands of professionals prepare for Insurance Licensing and Securities exams and helped them maintain licensure through our full line of Continuing Education Courses. |
| Kelsey National Corporation | 502 | www.kelsey.com | Kelsey National Corporation (KNC) is an experienced marketer and administrator of fully insured group and HMO benefit plans, developed especially for Small Businesses and Trade Association Members across the United States. KNC offers a competitive line of group dental, life and disability income products. Additionally, KNC offers a portfolio of quality insurance products and HMOs to individual customers through the websites HealthInsurance.com and DentalInsurance.com and also offers an on-line dental and vision exchange for retirees of large corporations. |
| Leading Advisor | 406 | www.leadingadvisor.com | Since 1997 Simon Reilly has been working with Financial Services Professionals to go beyond the mechanics of success. Leading Advisor’s coaching program pulls back the curtain and allows clients to understand what holds them back from realizing their greatest potential. Simon doesn’t motivate; he educates and mentors clients so they can inspire themselves, thus being able to |

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| | | | transform their businesses creating fulfilling, rewarding, and sustainable success. |
| LegalShield/Rick Hemphill | 303 | www.hfgdata.com | |
| Liberty Tax Service | 214 | www.libertytaxfranchise.com | Tax franchise opportunities at Liberty Tax Service are built on unmatched customer service, extraordinary franchisee support and a small business opportunity created by the "Granddaddy of Taxes." Liberty is America's Tax Service offering computerized tax preparation and accounting business opportunities at every office. |
| Life Happens | 209 | www.lifehappens.org | Life Happens is a non-profit organization designed to address the public's growing needs for information and education on life, disability, and long-term care insurance. Life Happens also seeks to remind people of the important role agents perform in helping families, businesses, and individuals find the insurance products that best fit their needs. |
| LifeSecure Insurance Company | 109 | www.yourlifesecure.com | LifeSecure Insurance Company, founded in 2006, provides un-complicated long term care, hospital indemnity and accident insurance products. We maintain a constant focus on innovation and new technology solutions designed to simplify the insurance buying and selling processes. LifeSecure is headquartered in Brighton, MI – and currently licensed in 46 states and the District of Columbia. |
| LightSpeed VT | 612 | www.lightspeedvt.com | LightSpeed VT is a training solutions company. |
| Lincoln Finanical Group | 507 | www.LincolnFinancial.com | Lincoln Financial Group is the marketing name for Lincoln National Corporation (NYSE:LNC)and its affiliates. Through its affiliated companies,Lincoln Financial Group offers: annuities; life, group life and disability insurance; 401(k) and 403(b) plans; savings plans; mutual funds; managed accounts; institutional |

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| | | | investments; and comprehensive financial planning and advisory services. |
| Live Oak Bank | 302 | liveoakbank.com/advisory | Live Oak Bank was founded in 2008 with one goal: provide loans to independent business people in niche industries. Our Investment Advisory team provides domain expertise and industry knowledge for a $200 million and growing loan portfolio. With financing in great demand in the industry, we guide Independent Investment Advisors through the lending process with knowledge and expertise. Our extensive financing options can help fund mergers and acquisitions, succession, expansion and recruiting, working capital, loan payoff, transitions, commercial real estate and other business financing needs. Contact our team for more information: liveoakbank.com/advisory |
| Melville Capital | 208 | melvillecapital.com | Melville Capital is a Life Settlement Advisor and Broker focused on monetizing existing Life Insurance Policies. Our team of licensed insurance professionals has created a large network of institutional investors who bid against each other, similar to an auction process, thus ensuring the client highest possible offer. We represent the policy owner, insured and referral source in negotiating bids and handle all aspects of the transaction. In the end, the client receives a lump sum cash payment that is typically many times larger than the cash surrender value and is relieved of all future premium payments. |
| MetLife Premier Client Group | 501 | www.metlife.com | MetLife, Inc. is a leading global provider of insurance, annuities and employee benefit programs. Through its subsidiaries and affiliates, MetLife holds leading market positions in the United States, Japan, Latin America, Asia, Europe, the Middle East and Africa. |

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| MoneyGuidePro | 307 | http://www.moneyguidepro.com/ | MoneyGuidePro, innovated by PIEtech, Inc., is the industry's leading financial planning software. MoneyGuidePro makes powerful, profitable planning easy, allowing financial advisors to help more clients achieve their financial goals. MoneyGuidePro provides college, retirement, estate and Social Security planning, investment and insurance needs analysis, technology integration and account aggregation. |
| NAIFA - LILI | 418 | http://www.naifa.org/professional-development/leadership-in-life-institute | The NAIFA Leadership in Life Institute (LILI) is devoted to advancing your personal growth, business practices, and professional skills. Through this six-month leadership program, NAIFA members explore professional and personal topics with the goal of enriching every aspect of their lives -- from family to business to association. Topics include time management, vision and mission statements, effective relationships, business plans, and emotional intelligence. |
| NAIFA ClientCast® | 308 | http://NAIFAClientCast.com | The two-part marketing program for insurance & financial professionals. Part 1: We provide you with educational marketing content to use with clients, prospects & social media. Part 2: Gain sales ideas & best practice strategies from the industry's top experts with Power Session LIVE webinars. "This is the best NAIFA member benefit offered. It takes writing one piece of business to make my membership worth it." -NAIFA Member Lance Leonard, Issaquah, WA. |
| National Association of Professional Agents | 606 | napa-benefits.org | The National Association of Professional Agents (NAPA) is dedicated to providing valuable benefits and services to licensed agents working in the insurance and financial services industry in all 50 states. We offer customized programs through company sponsored plans as well as |

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| | | | individual memberships. NAPA specializes in Errors & Omission insurance and provides access to life, health, wellness, home and auto, plus many other insurance products and discounted business services to meet your professional needs. |
| National Purchasing Partners | 400 | mynpp.com | National Purchasing Partners (NPP) is a group purchasing organization that negotiates discounts on behalf of its members. With a free membership, and no obligation to purchase, NPP members receive significant discounts on many essential products and services with some of the nation's top companies, including, Verizon, Expedia and Staples. |
| Ohio National Financial Services | 601 | joinohionational.com | Tracing its corporate origins to 1909, Ohio National markets a variety of insurance and financial products through more than 50,000 representatives in 47 states (all except Alaska, Hawaii and New York), the District of Columbia, Puerto Rico and through affiliated operations in South America. |
| Penn Mutual Life Insurance Company | 509 | www.pennmutual.com | Life Insurance, Annuity, Planning |
| Personal Story Power with Bo Eason | 309 | www.boeason.com | Business is no longer just about negotiation strategies, closing techniques, well-written press releases or team-building exercises. The currency of successful businesses today is authenticity and deep connection with clients, vendors and the global community. International speaker, former NFL player, actor and playwright Bo Eason will train your people to master these skills. |
| Principal Financial Group | 500 | www.principal.com | The Principal Financial Group® offers businesses, individuals and institutional clients a wide range of financial products and services, including retirement, asset management and insurance, through its diverse family of financial services companies. The Principal Financial Group, Inc. is traded on the New York Stock |

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| | | | Exchange under the ticker symbol PFG. |
| Referral Coach International | 712 | www.ReferralCoach.com | We will help you acquire more high-level clients through referrals, personal introductions, and advocates. Referrals and personal Introductions are more important now than ever before – because its how your prospect would prefer to meet you! Building a thriving referral-based business is more than just asking. Bill Cates' gives you 10 proven strategies to help you acquire more high-level clients through referrals and introductions. Come see Bill's newest book, Beyond Referrals; his self-study system, The Referral Coach Academy. All extremely affordable, effective, and guaranteed! www.ReferralCoach.com |
| Retirement Funding Solutions | 300 | www.RFSlends.com | Retirement Funding Solutions was created to address and solve for one of the most significant challenges facing the Baby Boomer Generation today....Being Financially Prepared for Your Retirement Years. RFS is committed to educating Retirees and their families on the value of a product that has been created by the US Government during President Reagan's term in Office. Our Commitment to you is that the educational process will be based upon an honest, ethical and open dialogue. RFS' goal is to integrate our dialogue into your circle of trusted advisors, whether those be family or a team of financial professionals. |
| Sigma Financial Corporation | 600 | www.joinsigma.com | Sigma Financial Corporation partners with professional financial advisors committed to growing their practices in an ethical manner. We provide comprehensive financial planning tools, products, and services that support our representatives' efforts in helping their clients achieve financial success. Sigma Financial Corporation stands out as one of the last independent, mid-sized, Midwest broker-dealers. |

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| | | | Founded in 1983, we now partner with over 600 representatives. We choose to maintain a manageable size to focus on personal, responsive service. |
| Superior Mobile Medics | 700 | www.smminsurance.com | Superior Mobile Medics is an industry leader in the collection of health data that allows customers to make informed decisions on managing risk. We offer nationwide coverage for all insurance examination needs. In 2015, Superior celebrates its 20th Anniversary! We want to say THANK YOU to all of our clients and partners for making this anniversary possible. For more info, visit us online at www.superiormobilemedics.com |
| Ternian Insurance Group | 212 | www.ternian.com | Ternian Insurance Group is a leading provider of innovative benefit solutions that meet the needs of all types of employer groups, associations and individuals. In early 2015, Ternian was acquired by AXIS Accident & Health, whose products are underwritten by the operating subsidiaries of AXIS Capital, a global provider of specialty lines insurance and treaty reinsurance. Ternian offers the following solutions: • Limited Medical plans for employees not eligible for ACA Compliant Plans • MEC (aka Skinny Plans) • Minimum Value Plans • Executive Plans • Medical Supplement Plans • Dependent Plans |
| The American College | 401 | www.theamericancollege.edu | The American College is a non-profit educatinal institution with the highest level of academic accreditation, dedicated to the innovative training and development of financial services professionals. since 1927, The College has assembled faculties comprised of the foremost thought leaders in the industry,created for professionals, dedicated to your success. |
| The PT Services Group | 603 | www.theptservicesgroup.com | We open the door to new prospects and new business for the financial services and |

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| | | | insurances industries. Since 1992, The PT Services Group has specialized in appointment setting, business intelligence, and data collection for these very unique industries. With locally hired sales associates, experienced in interacting with C-level executives and high-level decision makers, The PT Services Group uses proprietary techniques to break through screens and voice verify business intelligence. |
| The Taylor Method | 720 | www.thetaylormethod.com | The Taylor Method is a sales training system that utilizes practical teachings from real life examples. It was created by Eszylfie Taylor, an MDRT Top of the Table producer, who developed this method over the course of his 15 year career. It utilizes his successes and failures over that span and converts them into practical application concepts for financial advisors of all tenures. |
| Unibind, Inc. | 408 | www.unibindusa.com | Unibind provides its clients in over 120 countries with revolutionary binding systems and a complete range of accessories for their presentation needs. Unibind systems professionally bind documents in 90 seconds, and provide a large assortment of presentation options, including personalized hard cover books. |
| Voya Financial | 312 | www.voya.com | Voya Financial, Inc. (NYSE: VOYA), is composed of premier retirement, investment and insurance companies serving the financial needs of approximately 13 million individual and institutional customers in the United States. The company’s vision is to be America’s Retirement Company™ and its guiding principle is centered on solving the most daunting financial challenge facing Americans today — retirement readiness. |
| WIFS | 706 | www.wifsnational.org | For more than 75 years, WIFS has been the preeminent association committed to |

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| | | | | attracting, developing and advancing women in the industry. 1,100+ members benefit from education, peer connection, mentorship, local chapters and annual conference. |
| Woodbridge Structured Funding, LLC | 512 | | www.woodbridgecommercialmortgage.com | Woodbridge has been providing superior financial products for over 35 years. With an array of asset-backed, alternative wealth-building opportunities, Woodbridge and its predecessor entities have completed more than $1.5 billion in financial transactions while maintaining a reputation for service and reliability that is second to none. |
| Woodbury Financial | 602 | | | Woodbury Financial is an advisor focused broker-dealer that shares your people-first approach to financial planning and insurance solutions. As a part of Advisor Group, we're able to offer the resources of a larger broker-dealer, yet we operate independently, which allows us to maintain the rich culture and close relationships of a small firm. |
| www.TomHegna.Com | 708 | | www.tomhegna.com | Tom Hegna is the author of 3 books, Paychecks and Playchecks:Retirement Solutions for Life, Retirement Income Masters:Secrets of the Pros and most recently authored Don't Worry,Retire Happy! Seven Steps to Retirement Security which is based on his popular public television show. Tom has been a popular industry speaker for many years and is THE retirement income expert. As a former Fortune 100 senior executive, Tom has dedicated his entire career to helping retirees obtain a happily ever after retirement. He has been featured on FoxBusiness, American College Wealth Channel Magazine, Round the Table, Advisor Today and GAMA Magazine. |