

WOMEN IN BUSINESS



ARDEN HILLS, MN | APRIL 24-26, 2024

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GRADIENT WOMEN IN BUSINESS LIVE

AGENDA | APRIL 24-26

Wednesday, April 24

A.M./P.M.

Arrivals at Minneapolis International Airport (MSP) and transfers to Hilton Garden Inn (Shoreview)

5:30 P.M.

Shuttle departs hotel for O'Shaughnessy Distilling Company

6 P.M.–8 P.M.

Mock Client Event

Women, Wine/Whiskey, & Wealth at O'Shaughnessy Distilling Company

Jean C.

Lisa Schreiber, Investment Analyst, Gradient Investments

8 P.M.

Shuttle departs for hotel

Thursday, April 25

7 A.M.–8 A.M.

Breakfast available at hotel

8:15 A.M.–8:30 A.M.

Opening remarks

Kristina Walch, Chief Operating Officer, Gradient Financial Group

8:30 A.M.–9:15 A.M.

Carrier Panel: Untapped Markets

Kristina Walch, Chief Operating Officer, Gradient Financial Group

This panel provides a unique opportunity to gain diverse perspectives of untapped markets in the financial services industry that female financial professionals can add to their practices. This discussion is from the lens of our insurance partners, who will provide real-world insight and an in-depth understanding of segments of the population you may be missing out on.

9:15 A.M.–10:15 A.M.

Producer Panel: Market Niche

Barb G., Skye L., Joanna N.

Katie Grindeland, Chief Marketing Officer, Gradient Financial Group

Hear from fellow financial services professionals on what markets they are tapping into in 2024 and how they used these niches to get ahead of the competition. From having a tax or CPA practice to positioning life insurance appropriately with prospects and clients, you'll be able to key in on what makes this panel of female advisors different.

10:15 A.M.–10:30 A.M.

Break

10:30 A.M.–11:30 A.M.

Keynote Speaker — Words Matter

Linda Burm, Retired Chief Distribution Compliance Officer at Allianz Life

- What you say matters
- How to build trust and credibility
- How you talk to your team is how they talk to their clients

11:30 A.M.–12 P.M.

Overcoming Objections

Jaime Malm, Senior Vice President of Marketing, Gradient Annuity Brokerage

- How to prevent objections from happening in the first place
- The most common mistakes made when attempting to overcome objections
- Best practices to incorporate into your appointment process to address objections effectively

12 P.M.–1 P.M.

Lunch

1 P.M.–1:45 P.M.

Processes Executed Repeatedly Win

Kaitlyn Wyngaard, Manager of Organization Development, Gradient Financial Group

- Top processes to streamline and scale your business
- How successful offices are putting processes together
- Using processes to retain your staff and enhance client experience

1:45 P.M.–2:30 P.M.

Catch Their Ears and Then Their Eyes

Stephanie G.

Carlynn Hosking, Director of Gradient Positioning Systems

- The benefits of using radio and TV for marketing in the financial services industry
- Increase credibility using trustworthy platforms: radio and TV
- Opportunity for brand integration: With visual and audio elements, radio and TV allow for brand integration without being too intrusive

2:30 P.M.–2:45 P.M.

Break

2:45 P.M.–3:30 P.M.

Building Trust and Credibility Through Fact-Finding

Kelly R.

Kim Johnson, Investment Consultant, Gradient Investments

- Getting clients to open up and let their walls down
- Using the COMRA to assess risk
- How to create credibility

3:30 P.M.–4:15 P.M.

Presenting Strategy for the Best Buy-In

Sandy M.

Jaime Malm, Senior Vice President of Marketing, Gradient Annuity Brokerage

- Highlighting the psychology of selling
- The hidden gems you probably aren't using
- Little touches with big impacts

4:15 P.M.–4:45 P.M.

Producer Panel on Implementation and Ongoing Relationships

Karen D., Debbie M., Renee R.

Gretchen Beatty, Director of Organizational Development, Gradient Financial Group

Today's successful advisor needs to have a brand that is visible in many ways in their community. Hear from fellow female advisors on their community-centric efforts to ensure their brand remains top of mind. Dive into the experts' minds on how they approach community events, ongoing relationships with clients, gifting and more.

4:45 P.M.–5 P.M.

Setting the Stage for the Mock Dinner Seminar

Jenna C.

Gretchen Beatty, Director of Organizational Development, Gradient Financial Group

5:15 P.M.

Shuttle departs hotel for dinner seminar at the Charleston Event Center

5:30 P.M.–7 P.M.

Mock Dinner Seminar

Enhanced Planning Seminar

Jenna C.

7:15 P.M.

Shuttle departs Charleston Event Center for hotel

Friday, April 26

7 A.M.–8 A.M.

Breakfast available at hotel (*check out of room and move luggage to the lobby*)

8:15 A.M.–8:30 A.M.

Opening remarks

Gretchen Beatty, Director of Organizational Development, Gradient Financial Group

8:30 A.M.–9:15 A.M.

Community Connection

Logan J.

Sherri Heil, Manager of Project Management, Gradient Position Systems

- Support local through community connection
- Using your brand to make a difference in your community
- Leveraging Gradient Gives Back

9:15 A.M.–11:45 A.M. (break within the session)

Featured Speaker: Creating a Culture of Productivity

Jan Lehman

- Understanding the value of time
- Implementing technology to make your day more efficient
- Your involvement is critical to effect change in the office

Workshop on Creating a Culture of Productivity

- Repurposing wasted time
- Maximizing your talent — effective delegation
- Running a highly effective meeting
- Taking control of your inbox — don't let it control you

11:45 A.M.–12 P.M.

Closing remarks

Katie Grindeland, Chief Marketing Officer, Gradient Financial Group

12 P.M.

Boxed lunches

12:30 P.M.

Shuttle departs for Minneapolis International Airport (MSP)