

6TH NATIONAL ASSEMBLY

"Growth Gratifude"

JUNE 16TH - 19TH 2022

THE WESTIN WASHINGTON NATIONAL HARBOR

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NATIONAL HARBOR

A LETTER FROM OUR FOUNDER

Thank you for taking time, that most precious of resources, to join us for the 6th National Assembly of the Association for Wholesaling Diversity (AWD). As a spouse, parent, grandparent, and wholesaler, I believe each moment spent away from one's family must be worth it. Our mission--improving the community, development, advancement & recruitment of Black financial services wholesalers everywhere--is absolutely worth it.

Thank you Members for putting in work daily, as exceptional distribution intermediaries helping your clients improve their clients' outcomes. Thank you Sponsors for your unwavering financial support and ongoing recruitment & advancement of our members, all of which makes this year's gathering possible. Special thanks to AWD's 2022 Conference Planning Committee and third party event planning consultant, PMC-LLC, for your diligence in bringing our 2022 Conference, Assembly, Career Expo and Networking Events to fruition!

As AWD continues to build and strengthen the Black wholesaling community, your commitment as a Member or Sponsor becomes even more critical. Please find me and say hello this week so I can personally thank you, and answer any questions about AWD and our programs. Enjoy this year's gathering! Thank you again!

Fervently,

Marlōn Hall

Marlon Hall

Founder

Association for Wholesaling Diversity





"Growth & Gratifude"



WHAT IS AWD?

A BRIEF SNAPSHOT

AWD is a 501(c)(3) non profit staffed by black financial services wholesaler volunteers. Founded in 2016, AWD continuously executes on four primary initiatives: 1) strengthen and grow the community of black wholesalers we have built, 2) aid in the ongoing professional development of black wholesalers, 3) continue leveraging and scaling up our combined networks to facilitate career advancement for black wholesalers, and 4) recruit, train, and welcome black students and career changers into our thriving black wholesaler community.

WHAT DOES AWD DO?

A BRIEF SNAPSHOT

- AWD formally trains & mentors black college students in preparation for careers in wholesaling.
- AWD subsidizes the costs of members' professional resume review, interview prep & career coaching.
- AWD provides need-based scholarships for members earning their professional designations.
- AWD provides an instant industry-wide community to black wholesalers & black individuals adjacent to wholesaling,
- AWD members know they are NOT alone in this business.
- AWD speaks to black college students nationwide about wholesaling as a career choice.
- AWD collects & distributes financial services wholesaling job opportunities to candidates & students nationwide.



The Association for Wholesaling Diversity (AWD) began in 2016 as a like-minded group of Black External Wholesalers in the financial services industry. Originally called 'Black External Wholesalers', the group primarily utilized word-of-mouth and the business networking platform LinkedIn to connect with other financial services industry external wholesalers who were black; to network, share universal best practices & sales ideas, assist black internal wholesalers in their efforts to become external wholesalers, and educate black youth about the career opportunities in our hidden niche within financial services.

Today, AWD partners with financial services firms who: 1) employ wholesalers, and 2) support our overall mission of advancing and recruiting more black wholesalers into the financial services industry.

An AWD member is, by definition, any black wholesaler (intermediary distribution, strategic accounts, and advanced markets), at any financial services firm, anywhere on the sales vertical from top to bottom, covering any region, representing any product, in any channel, and using any title (We see you Directors, Consultants, Relationship Managers, Specialists, etc.).

All AWD members have complimentary access to the many resources we provide. Active engagement with, and paying tax-deductible membership dues to, AWD are simply an expression of a member's support for their organization. These expressions are not a requirement of membership. Black people become members when they become wholesalers.

AWD Adjacents include black financial services professionals who are not directly involved in distribution, but work closely to support the wholesaling function (training, compliance, recruiting, DE&I, etc.), and want to be involved in supporting AWD initiatives.

AWD Alums are former black wholesalers who remain engaged and involved in supporting AWD initiatives.

Due to the nature of the wholesaling industry and the sensitive compliance relationship between wholesalers and financial advisors, AWD directs all Financial Advisor inquiries to our partners Quad-A (The Association of African American Financial Advisors).

Thank you for attending the 6th National AWD Assembly in Washington, DC. Network, learn, mentor, and be mentored. We will see you soon at an AWD Regional DInner in your metropolitan area!

With gratitude,

Marlon Hall

Marlōn Hall

Founder, AWD



AWD'S 6TH NATIONAL ASSEMBLY "Growth & Gratfude"











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AMG is proud to support the
Association for Wholesaling Diversity
and their commitment to
African-American financial professionals



Association for Wholesaling Diversity

AWD NATIONAL CONFERENCE - AGENDA

AWD National Conference Check-In Thursday June 16th 2022

- Guests Arriving Thursday Check-In All Day at The Westin National Harbor: 4:00 PM
- AWD Conference Pre-Reception: 4:15 PM (Conference Sponsor Commercials + "Why AWD" Videos play throughout all breaks)
- Busses Depart for The Washington Nationals Suite, Dinner & Networking Event <u>Brought to you by Equitable</u>: 5:30 PM
- Busses Return to The Westin National Harbor: 8:00 PM

AWD National Conference Theme: "Stronger Together" Friday June 17th 2022

- Guests Arriving Friday Check-In All Day / Breakfast: 7:15 AM 8:15 AM Brought to you by Securian
- General Session Starts: 8:20 AM
- Opening Remarks: 8:20 AM 8:35 AM
 Marlon Hall, AWD (includes Introduction of Kaana Smith & AWD Executive Committee)
- Conference Platinum Sponsor Presentation: 8:40 AM 9:25 AM / Phil Melville, Brighthouse
- Wholesaling Best Practices: 9:30 AM 9:50 AM / John Sierawski, Sequoia Systems
- Mid-Morning Networking Break: 9:55 AM 10:10 AM Brought to you by MFS
- Panel Discussion: 10:15 AM 11:00 AM
- "Black Women in Wholesaling" Moderator: Candice Darien, AWD
- Lunch Networking Break: 11:05 PM 12:05 PM Brought to you by AIG
- "Wholesaling as a Craft Best 5 Minutes" Sponsored Boot Camp Breakouts: 12:10 PM 1:25 PM
 - □ MassMutual / Invesco Boot Camp Breakout Room 1 "The Resilient Advisor"
 - □ Brighthouse / MFS Boot Camp Breakout Room 2 "Advisor Follow Up Techniques"
 - $\hfill \square$ Capital Group / Securian Boot Camp Breakout Room 3 "Adding New Producers"
 - $\hfill \Box$ T. Rowe Price / AIG Boot Camp Breakout Room 4 "Territory Segmentation Techniques"
 - □ Prudential / Equitable Boot Camp Breakout Room 5 "Adding Value Beyond Product"
- Mid-Afternoon Networking Break: 1:30 PM 1:45 PM Brought to you by Capital Group
- 5 Boot Camp Winners "Best 5 Minutes" Compete for Top Gun: 1:50 PM 2:25 PM (All sponsors vote, winner announced at Dinner)
- Conference Platinum Sponsor Presentation 2:30 PM 3:15 PM / <u>Dominic Blue, MassMutual</u>

AWD'S 6TH NATIONAL ASSEMBLY

"Growth & Gratifude"

- Keynote Presentation: 3:20 PM 4:20 PM
- "Non-Verbal Communication" Linda Clemons, CEO, Sisterpreneur, Inc.
- Closing Remarks: 4:25 PM 4:40 PM / Marlon Hall, AWD (includes housekeeping)

AWD Sponsor Dinner & Awards Ceremony at Union Station DC Friday June 17th 2022

- Busses Depart for Union Station: 6:30 PM
- AWD Sponsor Dinner & Awards Ceremony: 7:00 PM 9:45 PM
- Busses Return to The Westin National Harbor: 10:00 PM

AWD National Conference Saturday June 18th 2022

All Conference Attendees

- Guests Arriving Saturday Check-In All Day / Breakfast: 8:00 AM – 9:00 AM <u>Brought to you by T. Rowe Price</u>

Non-AWD Members / Sponsor Guests / Students

- AWD Conference Sponsor Live College Job Fair & Networking Event: 9:15 AM 12:00 PM
 - ☐ MassMutual, Brighthouse, Capital Group, T. Rowe Price, Prudential, AIG, Equitable, MFS, Securian, Jackson, Invesco
 - □ Students from the AWD Wholesaling Development Program, Local Colleges, Universities, Fraternities, Sororities, and HBCUs
- Conference Attendees Lunch-to-Go / Non-AWD Member Conference Ends Non-Member Guests Check-Out: 12:00 PM

AWD Members (Black Wholesalers) Only

- Opening Remarks: 9:15 AM 9:30 AM / Marlon Hall
- Top Wholesaler Forum: 9:35 AM 10: 35 AM
- "Mastery of Wholesaling Fundamentals Part I" / Moderator: Julian Curry
 - ☐ Personal Value Proposition
 - □ Wholesaling vs Consulting
 - □ The Art of Closing
 - □ Voicemail Techniques

AWD'S 6TH NATIONAL ASSEMBLY

"Growth & Gratifude"

- Mid-Morning Networking Break: 10:40 AM 10:55 AM
- (AWD Videos play during break)
- Panel Discussion: 11:00 AM 11:45 AM
- "Black Sales Executives / Getting Promoted" / Moderator: Wayne Ewan
- Lunch Networking Break: 11:50 AM 12:50 PM
- (AWD Videos play during lunch)
- Top Wholesaler Forum: 12:55 PM 1:55 PM
 - "Mastery of Wholesaling Fundamentals Part II" / Moderator: Ira Cox
 - □ Ideal IW / EW Partnership
 - □ Professional Designations
 - □ Branding
 - Managing Up
- Breakout Sessions: 2:00 PM 2:45 PM (Member's Choice)
 - □ Virtual Wholesaling / Moderator: Charles Samuel
 - □ Capital Markets / Presenter: Keon Scott
 - □ Wholesaling Soft Skills / Moderator: Wayne Ewan
 - ☐ Financial Independence Retire Early (FIRE) / Moderator: Andre Dowtin
 - ☐ Legal Best Practices / Moderator: Ron Williams
- Mid-Afternoon Networking Break: 2:50 PM 3:05 PM
- (AWD Videos play during break)
- Keynote Presentation: 3:10 PM 4:10 PM
- "Black Financial Wellness" / Dr. Dennis Kimbro, Professor, Clark Atlanta University
- Closing Remarks: 4:15 PM 4:35 PM / Marlon Hall (includes housekeeping)

AWD Members, Prudential Executives, Remaining Guests

- Vessel Departs for The River Boat Cruise on the Potomac, Dinner & Networking Event <u>Brought to you by Prudential</u>: 6:00 PM
- Ship Returns to The Westin National Harbor: 9:00 PM
- 2022 AWD National Assembly Ends Cocktail Hour at The Westin Hotel Bar

AWD Members & Remaining Guests Checkout Sunday June 19th 2022

- Hotel Check-Out Time: 11:00 AM

AWD'S 6TH NATIONAL ASSEMBLY "Growth & Gratifude"

Thank you sponsors!

2022 Conference Sponsors:

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Conference Sponsors

Prudential Financial, T.Rowe Price

Event Sponsors

Capital Group, MFS Investment Management, AIG, Securian Financial, Equitable

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Equitable, Pacific Life, CUNA Mutual, Prudential Financial, T. Rowe Price

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2022 CONFERENCE PLANNING COMMITTEE

Members

Ira Cox, MBA, CIMA

Julian Curry

Candice Darien, MSM, CLTC

Wayne Ewan

Marlon Hall, CFS

Gordon Henderson, CRPC

Event Planning Consultant: PMC-LLC

Principal: Christian Nwasike, MBA

Project Manager: Karmen Herring

Marketing Manager: Christin Weir

Event Planning Consultant: People 1st, LLC Principal: Andre Dowtin

Secretary: Snow Marlonsson, MLIS

AWD'S 6TH NATIONAL ASSEMBLY "Growth & Gratifude"

AWD NON-PROFIT ADMINISTRATION

Marlōn Hall, CFS

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Wayne Ewan Vice President

Ron Williams, ChFC Vice President

Andre Dowtin Managing Director

Snow Marlonsson, MLIS Clean as Snow, LLC Webmaster / Administrative Services Joseph G. Webb Webb Law Group, LLC Legal Services

Lucius Ashby, CPA Banks, Finley, White & Co. Accounting Services Celisa Jackson & Marqudi Tyler Liberty Bank and Trust Co. Banking Services

AWD EXECUTIVE COMMITTEE

<u>Chair</u>

Marlon Hall, CFS

Members

Ira Cox, MBA, CIMA

Julian Curry

Candice Darien, MSM, CLTC

Andre Dowtin

Wayne Ewan

Charles Samuel, CLU, ChFC

MEMBER DEVELOPMENT COMMITTEE

Senior Chair

Candice Darien, MSM, CLTC

Vice Chair

Gordon Henderson, CRPC

Members

Julian Curry

Andre Dowtin

Charles Samuel, CLU, ChFC

Wholesaler Training Consultant: Sequoia System International *Principal:* John Sierawski

JOB PREPARATION COMMITTEE

Chair

Terrell Golden, AAMS

Vice Chair

Julian Curry

Members

Andre Dowtin

Michael Jordan

Nilsa Roberts

Career Coaching Consultant: Franklin Paterson, Inc.

Principal: Janis Ransom

MEMBER OUTREACH COMMITTEE

Chair

Victor Howell, CAIA

Vice Chair

Keon Scott

Members

Marvin Etienne, CFP, CIMA

Davis Hull

Rickie Taylor

2021 ZOOM CONTENT COMMITTEE

Chair

Kumar Jagdeo, MBA, CIMA

Members

Howard Crockett, CLTC

Michael Jordan

Christopher Phillips

Nathaniel Poole

ACADEMIC OUTREACH COMMITTEE

Chair

Ron Williams, ChFC

Members

Kimberley Brown, MBA

Wayne Ewan

Vinnett Mason

Ted Mekonnen

Quinton Spratt, LUTCF

Student Licensing Consultant: Zahn Associates

Principal: David Snyder

WHOLESALER DEVELOPMENT PROGRAM ® GRADUATES

*attending conference, (job offer accepted at AWD sponsor firm)

Fall 2021

Keenan Tate, Jackson State University, summa cum laude
Camrie Hart, Bowie State University, magna cum laude (T. Rowe Price)
Lauryn Webb, Jackson State University, cum laude
*Willandria Clarke, Central State University

*Prinika Smith, Central State University

*Alia Wilson, Central State University

Abigel Kassa, Bowie State University

Danielle Thompson, Central State University

Spring 2022

*Alex Dorsey, University of Tampa, summa cum laude (Franklin Templeton)

*Anita Flowers, Bowie State University, magna cum laude

*Charles King, Metropolitan State University, cum laude (Securian)

*Kentin Wallace, Central State University

*Olivia Steele, Florida International University

WHOLESALER DEVELOPMENT PROGRAM ® GRADUATES

*attending conference, (job offer accepted at AWD sponsor firm)

Spring 2022 cont'd...

*Abhinav Singh, Texas Southern University
*LaMonica Howard, Texas Southern University
*Monica Delahoussaye, Texas Southern University
*Oluwatobi "Tobi" Jegede, Texas Southern University
Razaq "Raz" Amokomowo, Bowie State University
Akintunde Akinwumi, Texas Southern University
Arianna O'Neil, Texas Southern University
Desmonae McCloud, Texas Southern University
Devansh Chadha, Texas Southern University
Jacob Hines, Texas Southern University
Lakenya Bufford, Texas Southern University
Larry Holmes, Texas Southern University
Rayna Williams, Texas Southern University
Sharnessa Mendez, Texas Southern University
Tyler Macon, Texas Southern University

AWD'S 6TH NATIONAL ASSEMBLY "Growth & Gratifude"



Congratulations AWD

On the 6th Annual Conference & the organization's ongoing growth

Wall Street Bound, Inc is a 501(c)3 nonprofit organization with a mission to recruit, train, and mentor diverse college and university talent for careers in the financial services

To learn more visit our site: www.wallstreetbound.org



Lincoln invites students and internal and external wholesalers to explore our internships and wholesaling job opportunities.

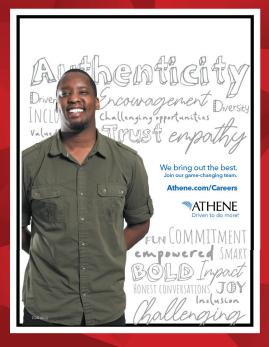
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MARLON HALL



FOUNDER'S AWARD

FOUNDER'S AWARD: LEADERSHIP

Nominees

Candice Darien, Nationwide

Terrell Golden, Pacific Life

Richard Porter, Nationwide

Charles Samuel, AIG

Ron Williams, Securian

KAANA SMITH



PIONEER AWARD

PIONEER AWARD: MOST IMPACTFUL NEW IDEA

Nominees

Howard Crockett, New York Life & Keith Frasier, Symetra (Web-Based Job Board)

Marlōn Hall, Jackson (Regional Dinners)

Michael Jordan, Brighthouse Financial (Member Surveys)

Snow Marlonsson, Web Design Consultant (Complete Website Update)

Ron Williams, Securian & Quinton Spratt, Franklin Templeton (Wholesaler Development Program)

IRA COX



LIFETIME ACHIEVEMENT AWARD

LIFETIME ACHIEVEMENT AWARD: 15+ YEARS CARRYING THE BAG

Nominees

Keith Frasier, Symetra

Julian Heyward, Allspring

Sebastian Mitchell, T. Rowe Price

Nilsa Roberts, AIG

George Washington, Jackson

JULIAN CURRY



SALES ICON

SALES ICON: MOST FEARED & ADMIRED WHOLESALER

Nominees

Charles Baker, New York Life

Gordon Henderson, Equitable 1290 Funds

Michael Jordan, Brighthouse

Jeremy Miller, Capital Group

Ron Williams, Securian

ANDRE DOWTIN



NETWORKING ICON

NETWORKING ICON: CONNECTING BLACK WHOLESALERS

Nominees

Marvin Etienne, Vanguard

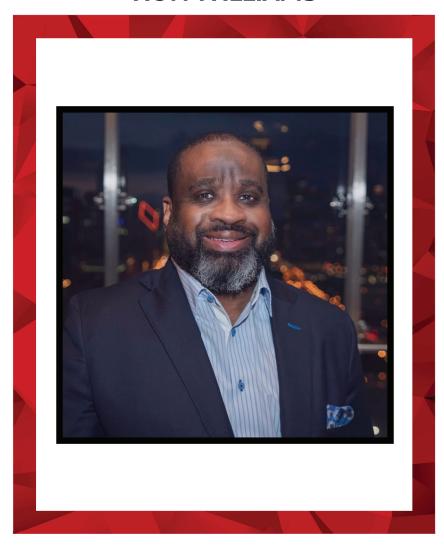
Davis Hull, Northern Trust

Victor Howell, Natixis

Keon Scott, Capital Group

Rickie Taylor, Retirement Plan Consultants

RON WILLIAMS



DEVELOPMENT & MENTORSHIP ICON

DEVELOPMENT & MENTORSHIP ICON: MOST IMPACT DEVELOPING OTHERS

Nominees

Howard Crockett, New York Life

Julian Curry, Pacific Life

Candice Darien, Nationwide

Wayne Ewan, T. Rowe Price

Terrell Golden, Pacific Life

SNOW MARLONSSON



ALLY OF THE YEAR

2021 ALLY OF THE YEAR: MOST IMPACTFUL NON-MEMBER

Nominees

Shelli Brown, Protective

Melissa Cox, Brighthouse

Carrie Dare, Prudential

Angela Martin, Equitable

Melissa Werner, T. Rowe Price

2021 ROOKIE EXTERNAL OF THE YEAR

Nominees

Nick Duran, T. Rowe Price
Deaven Jensen, First Trust
Awuley Quaye, Goldman Sachs
Armand Leaks, T. Rowe Price
Orian Williams, Pacific Life

2021 ROOKIE INTERNAL OF THE YEAR

Nominees

Koran Jordan, Protective
Brandyn Lee, Franklin Templeton
Duane Pinnock, Pacific Life
Danny Pollard, Jackson
Scott Sanon, Protective

2021 CORPORATE PARTNER OF THE YEAR: OVERALL SPONSOR COMMITMENT

Nominees

AIG

Brighthouse Financial

Equitable

MassMutual

Prudential Financial













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The Association of African American Financial Advisors [AAAA], Congratulates AWD on a successful 6th Annual Assembly.



Annual V.I.S.I.O.N. Conference Sept. 20th – 22nd 2022 Hyatt Regency Hotel Atlanta, GA www.aaafainc.org

