

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 – *Brought to you by Equitable*: 5:30 PM
- Busses Return to The Westin National Harbor: 8:00 PM

AWD National Conference

Theme: “Stronger Together”

Friday June 17th 2022

Moderator: Julian Curry, AWD

- Guests Arriving Friday Check-In All Day / Breakfast: 7:15 AM – 8:15 AM – *Brought to you by Securian Financial*
- General Session Starts: 8:20 AM – (Live Stream Webcast Begins)
- Opening Remarks: 8:20 AM – 8:35 AM / *Marlōn Hall, AWD* *(includes Introduction of Kaana Smith & AWD Executive Committee)*
- Conference Platinum Sponsor Presentation: 8:40 AM – 9:25 AM / *Phil Melville, Brighthouse Financial*
- 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 Investment Management*
- Panel Discussion: 10:15 AM – 11:00 AM “Black Women in Wholesaling” / *Moderator: Kaana Smith, AWD*
 - April Carter, MM / Whitney Rice & Loren Character, BH / Nilsa Roberts, AIG / Jazzlyn Sullivan, PRU / Sha’Meeka Gardener, EQ
- Lunch Networking Break: 11:05 AM – 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
 - T. Rowe Price / AIG Breakout 1 - Westin Executive Boardroom – “Adding New Producers / Prospecting”
 - MassMutual / Invesco Breakout 2 - Westin Potomac A – “Resilient Advisors / Adding Value Beyond Product”
 - Prudential / Equitable / Securian Breakout 3 - AC Hotel National Harbor I – “Gaining the Commitment / Closing”
 - Brighthouse / MFS Breakout 4 - Westin Potomac B – “What Next? / Follow Up Techniques”
 - Capital Markets Presentation Breakout 5 - AC Hotel National Harbor II – *Presenter: Keon Scott, Capital Group*
- Mid-Afternoon Networking Break: 1:30 PM – 1:45 PM – *Brought to you by Capital Group*
- 4 Boot Camp Winners “Best 5 Minutes” Compete for Top Gun: 1:50 PM – 2:25 PM *(sales managers vote, winner announced)*
- Conference Platinum Sponsor Presentation – 2:30 PM – 3:15 PM / *Dominic Blue, MassMutual*
- Keynote Presentation: 3:20 PM – 4:20 PM “Non-Verbal Communication” / *Linda Clemons, CEO, Sisterpreneur, Inc.*
- Closing Remarks: 4:25 PM – 4:40 PM / *Marlōn Hall, AWD* *(includes housekeeping, live stream web cast ends)*

AWD Sponsor Dinner & Awards Ceremony at Union Station DC

Friday June 17th 2022

- Busses Depart for Union Station: 6:30 PM
- AWD Dinner & Awards Ceremony: 6:45 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 – *Brought to you by Equitable*

Non-AWD Members / Sponsor Guests / Students

- AWD Conference Sponsor In-Person College Job Fair & Networking Event: 9:15 AM – 12:00 PM
 - MassMutual, Brighthouse, Capital Group, T. Rowe Price, Prudential, AIG, Equitable, MFS, Securian, Invesco, Jackson, Zahn
 - 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: 11:00 AM

AWD 2022 National Assembly

AWD 6th Annual National Assembly

Theme: "Growth & Gratitude"

Saturday June 18th 2022

AWD Members (Black Wholesalers, Advanced Markets, Strategic Accounts, Leaders of Wholesalers) Only

- Opening Remarks: 9:15 AM – 9:20 AM / Marlōn Hall
- Open Forum: 9:25 AM – 10:35 PM "Wholesaling Fundamentals – Part 1" / Moderators: Ira Cox & Candice Darien
 - Ideal IW / EW Partnership
 - Professional Designations
 - Branding
 - Managing Up
- 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 Managers / Getting Promoted" / Moderator: Andre Dowtin
 - Powell, CUNA / Warren, PRU / Richardson & Moore, BH / Etienne, Invesco / Powell & Pryor, JXN, Wragg, TRP

Above panelists subject to availability
- Lunch Networking Break: 11:50 AM – 12:50 PM (*AWD Videos play during lunch*)
- Open Forum: 12:55 PM – 1: 55 PM "Wholesaling Fundamentals – Part 2" / Moderators: Julian Curry & Charles Samuels
 - Personal Value Proposition
 - Wholesaling vs Consulting
 - The Art of Closing
 - Voicemail Techniques
- Breakout Sessions: 2:00 PM – 2:45 PM (Member's Choice)

▪ Virtual Wholesaling / <u>Moderator: Charles Samuel</u>	Breakout: Westin Potomac A
▪ Wholesaling Soft Skills / <u>Moderator: Wayne Ewan</u>	Breakout: Westin Potomac B
▪ Legal Best Practices / <u>Moderator: Ron Williams</u>	Breakout: Westin Executive Boardroom
▪ Financial Independence Retire Early (FIRE) / <u>Moderator: Andre Dowtin</u>	Breakout: AC Hotel National Harbor I
- 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 – 4:20 PM / Marlōn Hall (*includes housekeeping*)

AWD Members, Prudential Executives, Remaining Guests

- Vessel Departs for The River Boat Cruise on the Potomac, Dinner & Networking Event – Brought to you by Prudential: 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

NOTE: All guests, members, and students are responsible for arranging their own airfare and transportation to and from all airports.

NOTE: All member lodging to be expensed to your employer. If your employer does not approve the expense, AWD will cover your lodging.

Thank you sponsors!

2022 Conference Sponsors: Premier Sponsors - MassMutual, Brighthouse Financial / Conference Sponsors - Prudential Financial, T. Rowe Price / Event Sponsors - Capital Group, MFS Investment Management, AIG, Securian Financial, Equitable

2021 & 2022 Corporate Sponsors: *Titanium Sponsors* – MassMutual, Brighthouse Financial / *Platinum Sponsors* – Equitable, Pacific Life, CUNA Mutual, Prudential Financial, T. Rowe Price / *Gold Sponsors* – AIG, MFS Investment Management, Protective Life, Jackson Financial, Invesco / *Silver Sponsors* - Harbor Capitol, Hartford Funds, Natixis Investment Managers, Symetra / *Contributors* - Allianz