



EVERVEST

ADVISOR GROWTH WORKSHOP

Seminar Marketing & Tax Planning Strategies
for Today's Retirement Advisors

May 28–29, 2026

InterContinental Minneapolis–St. Paul Airport | Altitude Room

ADVISOR NAME

COMPANY

FEATURED SPEAKERS

Scott Briggs

Premier Retirement Planning

Seminar Marketing Specialist

Brock Weaver, CPA

Pathway Asset & Tax Advisory

Tax Planning Specialist

Tommy Jondall

EquiTrust Life Insurance Co.

Guest Speaker

Matthew Holmbeck

EverVest — President

Dave Vitullo & Ben Stier

EverVest — Sales Leadership

My Goals & Commitments

Complete this before the first session. Revisit it at the end of Day 2.

My #1 Goal for This Workshop:

The Biggest Challenge I Want to Solve:

I Will Implement These 3 Things Within 30 Days:

1.

2.

3.

WORKSHOP OBJECTIVES

- › Generate retirement planning prospects through seminars

- › Build visibility and credibility in your local market

- › Convert seminar attendees into paying clients



- › Identify \$100K–\$500K tax savings opportunities

- › Scale your practice with proven systems

- › Leverage EverVest's carrier access and support platform

Workshop Agenda

DAY 1 — THURSDAY, MAY 28

4:00 PM	Registration & Networking
4:30 PM	Welcome & Workshop Overview — Ben Stier
4:40 PM	 Live Client Seminar Presentation — Scott Briggs
5:40 PM	Dinner + Why Seminars Work in 2026 — Scott Briggs
6:20 PM	 EquiTrust Spotlight — Tommy Jondall
7:00 PM	Networking & Social Hour

DAY 2 — FRIDAY, MAY 29

8:00 AM	Breakfast & Networking
8:15 AM	Visibility & Credibility — Scott Briggs
8:35 AM	Planning Your First Workshop — Scott Briggs
8:55 AM	Converting Attendees Into Clients — Scott Briggs
9:05 AM	Break
9:15 AM	 \$100K–\$500K Tax Savings — Brock Weaver, CPA
11:15 AM	Break
11:25 AM	 Why Advisors Partner With EverVest — EverVest Team
12:00 PM	Workshop Concludes

4:30–4:40 PM

Welcome & Workshop Overview

Ben Stier

EverVest

SESSION TOPICS

- › Current retirement market opportunity and why timing matters
- › What advisors will gain across both days
- › Overview of sessions and featured speakers
- › Introduction of Scott Briggs and Premier Retirement Planning

KEY QUESTIONS I WANT SCOTT TO ANSWER TODAY

THE #1 THING HOLDING MY SEMINAR PRACTICE BACK RIGHT NOW

ADVISOR NOTES

QUESTIONS I WANT ANSWERED ACROSS THIS WEEKEND

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 LIVE SEMINAR EXPERIENCE

4:40–5:40 PM

Live Client Seminar Presentation

Scott Briggs

Premier Retirement Planning

SESSION TOPICS

- › How Scott structures his complete 1-hour presentation
- › Audience engagement and trust-building techniques
- › Storytelling and emotional positioning
- › Transitioning attendees into scheduled appointments

TECHNIQUES I WANT TO USE IN MY OWN SEMINAR

PHRASES OR SCRIPTS I WANT TO REMEMBER

ADVISOR NOTES

WHAT RESONATED MOST WITH ME AS AN AUDIENCE MEMBER

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5:40–6:20 PM

Why Seminars Work in 2026

Scott Briggs

Premier Retirement Planning

SESSION TOPICS

- › Why seminars still accelerate trust faster than digital marketing
- › What has changed — and what successful advisors do differently
- › The retirement planning opportunity in today's market
- › How to position yourself as the go-to local advisor

THE BIGGEST SHIFT I NEED TO MAKE IN MY APPROACH

WHAT I NEED TO STOP DOING THAT'S COSTING ME APPOINTMENTS

ADVISOR NOTES

MY SEMINAR IDEA — TOPIC, AUDIENCE, LOCATION

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 **EQUITRUST SPOTLIGHT**

6:20–7:00 PM

EquiTrust Life Insurance Company

Tommy Jondall

EquiTrust Life Insurance Company

Bridge Strategy*Using annuities to bridge the income gap before Social Security begins***Roth Conversions***Converting assets to tax-free growth and reduce future RMD burden***WealthMax Bonus***First-year bonus structure — competitive positioning and client appeal***MarketFive FIA***Fixed indexed annuity with upside participation and downside protection***Why EquiTrust***Portfolio fit, competitive rates, and what sets them apart in your lineup***ADVISOR NOTES**

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EQUITRUST PRODUCT IDEAS FOR MY CLIENTS

7:00–7:45 PM

Networking & Social Hour

MAKE THE MOST OF TONIGHT — CONNECT WITH

Scott Briggs
Seminar structure, flow, and scripting

Brock Weaver, CPA
Tax planning and CPA collaboration

Tommy Jondall
EquiTrust products and case ideas

EverVest Team
Contracting, comp, and support

Fellow Advisors — Share what's working, compare markets, build your peer network

Connection Tracker

Name	Company / Role	Best Follow-Up Action	Date

8:15–8:35 AM

Visibility & Credibility

Scott Briggs

Premier Retirement Planning

SESSION TOPICS

- › Positioning yourself as the retirement specialist in your market
- › Building authority that attracts clients before the first meeting
- › Creating trust with seminar audiences through credibility signals

HOW I'M CURRENTLY POSITIONED — AND WHAT NEEDS TO CHANGE

3 WAYS I CAN BUILD LOCAL AUTHORITY THIS MONTH

ADVISOR NOTES

MY POSITIONING STATEMENT DRAFT

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8:35–8:55 AM

Planning Your First Workshop

Scott Briggs

Premier Retirement Planning

SESSION TOPICS

- › Venue selection — what works and what doesn't
- › Seminar structure, flow, and timing
- › Logistics, invitations, and room setup

MY SEMINAR PLAN — DATE, VENUE, TOPIC, ATTENDANCE GOAL

LOGISTICS I NEED TO FIGURE OUT BEFORE I CAN LAUNCH

ADVISOR NOTES

MY ACTION CHECKLIST — NEXT 30 DAYS

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8:55–9:05 AM

Converting Attendees Into Clients

Scott Briggs

Premier Retirement Planning

SESSION TOPICS

- › Appointment setting — how to ask and when
- › First and second appointment structure
- › Closing strategies that convert without pressure

MY BIGGEST DROP-OFF POINT AND WHAT I'LL DO DIFFERENTLY

SCRIPT OR LANGUAGE I WANT TO USE WHEN ASKING FOR APPOINTMENTS

ADVISOR NOTES

MY CONVERSION GOAL AFTER IMPLEMENTING TODAY'S STRATEGIES

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 FEATURED MAIN SESSION — 2 HOURS

9:15–11:15 AM

How Advisors Identify \$100K–\$500K Tax Savings

Brock Weaver, CPA

Pathway Asset & Tax Advisory | Full 2-hour deep-dive session

SESSION TOPICS

- › Identifying tax inefficiencies in client portfolios
- › Roth conversion strategies and optimal timing
- › Managing RMD exposure before and after retirement
- › Tax planning strategies for high-income clients
- › Pre-retirement tax positioning — the window of opportunity
- › Real case studies with \$100K–\$500K savings outcomes
- › Advisor + CPA collaboration strategies that win referrals

ADVISOR NOTES

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CLIENT NAMES WHO NEED A TAX REVIEW CONVERSATION

TAX CONCEPTS I NEED TO RESEARCH FURTHER



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My Workshop Commitments

Building Relationships, Exceeding Expectations

My seminar launch date:

My venue / location:

My first follow-up appointment scheduled with:

I will contact EverVest by:

I commit to taking action on what I learned this weekend.

MY TOP 3 TAKEAWAYS

1

2

3
