ALLEGIS ADVISOR GROUP & TOWNSQUARE CAPITAL

2019 KICKOFF

Thursday, January 10, 2019
8:30am-4pm

Embassy Suites by Hilton
10333 South Jordan Gateway
South Jordan, UT 84095

Kickoff Agenda

8:30AM-8:40AM	**Welcome** ***Chris Miller**, President – Allegis Advisor Group* ***Kurt Brown,** CIO – TownSquare Capital*	Ballroom
8:40AM-10:00AM	**Best Strategies and Tips to Ensure Your Best Year Ever!** ***Erin Botsford**, CEO - Botsford Financial Group* In this interactive general session, Erin will share the exact formula she has used and perfected over the past 20 years to evaluate her business and create a plan for the following year.	Ballroom
10:00AM-10:15AM	**15 min. break**	

MAIN PLATFORM

10:15AM-10:45AM	**Economic Update** ***Kurt Brown**, CIO –TownSquare Capital*	Ballroom
10:45AM-11:35AM	**From Survival to Sustainability – The Magic of Centers of Influences** ***Mark E. McKell**, Managing Partner – McKell Partners* ***Adam K. Mckell, CPA,** Wealth Advisor – McKell Partners* Move your practice from survival to sustainability by building effective COI relationships. Learn how the McKell Team has transformed their practice to serving higher net worth individuals, families and business owners by teaming with other professionals. Learn the skills and steps necessary to move your practice from good to great in 2019.	Ballroom
11:35AM-12:15PM	**40 min. Lunch**	

BREAKOUTS

12:15PM-1:00PM	**Enhancing your client portfolio reviews** ***TownSquare Capital Investment Team*** How do you handle tough client questions during portfolio reviews - especially in volatile markets. What materials are critical to share?	North Ballroom
12:15PM-1:00PM	**How Estate Planning Makes an Advisor Look Even Better** ***Lee S. McCullough, III,** Attorney – McCullough & Sparks* A good relationship with an estate planning attorney can make you look even better. Clients appreciate an advisor who helps them with important tasks, some of which provide no compensation to the advisor. Clients appreciate having an advisor who can connect them with the very best professionals and get them the very best service in all areas of their financial world. This presentation will describe methods and strategies that are valuable to every almost every client, including best practices for asset titling, beneficiary designations, asset protection, keeping assets within a family, preserving harmony within a family, and working effectively with other advisors.	South Ballroom
1:00PM-1:15PM	**15 min. break**	
1:15PM-2:00PM	**Introduction to Saratoga** ***Mark McClenahan,** Director of Investor Relations – Saratoga Research & Investment Management*	North Ballroom
1:15PM-2:00PM	**Retirement planning: finding a simple solution for guaranteed income** ***Ben Pollok**, VP, Strategic Sales Development – AIG*	South Ballroom
2:00PM-2:15PM	**15 min. break**	
2:15PM-3:00PM	**Using the new money manager strategies** ***TownSquare Investment Team*** We've added a handful of new strategic and tactical strategies to the platform – how can they improve your portfolio construction and smooth out returns for your clients?	North Ballroom
2:15PM-3:00PM	**Making Business Owners (part of) your business** ***Tyson Ferney,** Director of Advanced Markets – Allegis Advisor Group* ***Gary Anderson,** Director of Seminar Marketing – Allegis Advisor Group* In this session you will learn more about Allegis Advisor Group's exclusive PEAK Business Owner Summit marketing program. This is a turnkey program to help you make business owners part of your business – from getting them into the seats at your own Small Business Summit (3-4 hour educational event addressing business owner risks, challenges & opportunities) to delivering the content and providing the business solutions your business owner clients need. Allegis will help you every step of the way! If you already work with business owners or centers of influence come learn how to do it better. If you don't work with business owners come learn about the opportunity and how Allegis will help. Make business owners part of your business in 2019!	South Ballroom
3:00PM-3:15PM	**15 min. break**	
3:15PM-4:00PM	**PEAK Seminar Program** ***Gary Anderson,** Director of Seminar Marketing – Allegis Advisor Group* The Allegis PEAK Seminar program focuses on three areas to help you be successful as a producer: Methodology, branding and marketing, and protected territories and marketing credits.	North Ballroom
3:15PM-4:00PM	**IUL Advanced Training** ***Tyson Ferney,** Director of Advanced Markets – Allegis Advisor Group* Not all indexed life policies are the same. Which one should you consider depends on your client's objectives. Indexed policies are great for accumulation, but they also provide strong guarantees with cash value. Let's match your clientele with he right product and open new opportunities this year.	South Ballroom

Bios (in order of appearance)

Chris M. Miller, President – Allegis Advisor Group.
Chris is President of Allegis Advisor Group, a nationwide independent marketing firm and comprehensive financial planning firm specializing in life, disability and long-term care insurance as well as fixed & indexed annuities and registered products. Chris began his career in 1988 with Ernst & Young where he co-founded the Insurance Sales and Marketing Division. He then joined Beneficial Financial Group where he served as S.V.P – Customer Operations and later as S.V.P – Independent & Institutional Distribution for over 14 years. Chris is a seasoned leader with broad experience in Sales, Marketing, Finance, Operations and Strategy. He holds Bachelor and Master Degrees in Accounting from Brigham Young University. Chris is a Certified Public Accountant and holds NASD Series 6, 7, 66 and 24.

Kurt H. Brown, CIO – TownSquare Capital.
As Chief Investment Officer, Kurt heads the TownSquare investment committee in the design and construction of client portfolios including asset class selection and the vetting of outside money managers. With nearly 25 years of both buy and sell-side capital markets experience, Kurt has managed portfolios for Fortune 500 companies, hedge funds, university endowments, Taft Hartley plans, bank trust portfolios, and individual retirement accounts.

Prior to forming TownSquare, Kurt was a principal at Alta Capital, a high-quality growth equity manager based in Salt Lake City, Utah. During his 12 years with Alta, Kurt helped grow the firm's assets under management from $300 million to over $3 billion. In addition to his investment work, Kurt is frequently called upon to speak at investment conferences, universities, and CPA and Estate Planning conferences. Topics include capital markets inefficiencies and conflicts of interest associated with investment products and brokerage firms. Prior to Alta, Kurt was with Black Rock Capital and Bank of America / Montgomery Securities where he advised institutional clients on trading and risk management issues including the divestiture and hedging of concentrated equity positions and the creation of structured product. Kurt studied Finance and Economics at Brigham Young University where he currently serves as an adjunct professor and board member of The Ballard Center for Economic Self Reliance.

Erin Botsford, CEO – Botsford Financial Group.
Erin teaches financial advisors what she did to 10X her business and create a self-managing company. Her vast experience and authentic personality allows her to relate to advisors at all levels. She struggled for the first 7 years without taking a day off but through a fortuitous encounter, she learned the 5 Keys of Business Success. Within a few short years she had 10Xed her business and became a Barron's Top 100 Independent and Barron's Top 100 Women Advisor. Erin believes "modeling" what already works is the quickest way to achieve success. She is the author of 7 Figure Firm: How to Build a Financial Services Business that Grows itself.

Mark E. McKell, Managing Partner – McKell Partners
Mark's primary focus as Managing Partner is helping pre- and post-retirees combat the various complexities and risks they face by engaging in a highly personalized, comprehensive process. Unlike many financial professionals today, Mark advocates always doing the planning first and subsequently implementing optimal, strategic solutions. He is repeatedly acknowledged by clients for his consultative style and as a preferred partner by other service professionals such as CPAs and Attorneys.

Mark acquired his financial acumen from over 30 years of serving in the financial industry. He started his career in public accounting with Ernst & Young and later worked as a Corporate Controller, CFO, and CEO of a variety of enterprises. Since 2001, Mark has devoted his experience and training to helping people with their personal financial goals. He was named to the California State Board of the National Association of Insurance & Financial Advisors and earned membership in the Million Dollar Round Table, considered one of the highest standards of excellence in the financial services industry. Mark earned a BS in Accounting from Brigham Young University.

Away from work, Mark is a dedicated family man and classic car enthusiast. He and his wife, Susan, have been married for 35 years, and have four children (including three sons who are each Eagle Scouts) and six grandchildren.

Adam K. Mckell, CPA, Wealth Advisor – McKell Partners
As an Advisor, our clients work with Adam directly in the development and ongoing review of their wealth planning. From investments to tax, insurance, retirement and estate planning, Adam helps clients navigate the risks they face in order to help them achieve their goals. He very much embodies our comprehensive, detailed, holistic focus and passion for delivering optimal solutions. Adam is deeply involved in the growth of our practice and heads up the Investment Advisory, Tax and Social Security Planning capabilities of the practice.

Prior to formally joining McKell Partners in 2015, Adam began his career with Ernst & Young's wealth & asset management practice in New York City providing audit & advisory services to large institutions and investment companies like private equity groups, hedge funds and mutual funds. He later led financial statement audit teams at Grant Thornton LLP as a Senior Associate and worked closely with CFOs and Controllers of many publicly-traded and private companies across a variety of industries – primarily financial, technology and real estate.

Adam is an Eagle Scout and served as a full-time church missionary for two years in Brooklyn, NY where he also became fluent in Cantonese Chinese. He is CPA, Series 65 securities licensed, holds insurance licenses and graduated from Brigham Young University with a BS in Accounting and a second concentration in Chinese. Away from the office, Adam enjoys riding his bike to the beach and spending time with his wife Christy and two children.

Lee S. McCullough, III, Attorney – McCullough & Sparks
Lee S. McCullough, III is an estate planning attorney in Provo, Utah. Lee represents many of the wealthiest families in Utah, and many of the most wonderful people, regardless of financial condition. Lee teaches estate planning at the law school at Brigham Young University, and is a fellow of the American College of Trust and Estate Council. Lee enjoys canyoneering, backcountry skiing, tennis, and rock and blues saxophone.

Mark McClenahan, Director of Investor Relations – Saratoga Research
Mark McClenahan joined Saratoga in October 2013 as Director of Institutional Relationships. He is responsible for developing and cultivating Saratoga RIM's affiliations with advisors, consultants, and family offices within the professional investment community. He also assists the firm's fixed income investment team.

Prior to joining the firm, Mark spent twelve years as a Managing Director and Private Banker with Citi Private Bank's Law Firm Group. Before Citi, he worked for five years at Barclays Global Investors as a Principal and Manager of their Contract Administration Group. Previously, Mark worked as a financial planner at American Express Financial Advisors and at Charles Schwab.

Before entering finance, Mark served as a Judge Advocate in the U.S. Army, first on active duty (1989 to 1993) and then in the reserves (1995-2005); he retired as a Major. While in the military, he graduated from the Army's Command and General Staff College.

Mark attended Santa Clara University, earning a B.S. in Psychology in 1985. He then obtained a J.D. from Santa Clara University School of Law in 1988. Mark is also a Certified Financial Planner (CFP) and received a Master of Science in Personal Financial Planning from the College for Financial Planning. He is a member of the Idaho State Bar.

Mark grew up in the Bay Area and graduated from Serra High School in San Mateo. Mark enjoys spending his time with his wife and two daughters and running half marathons. He is the Vice President of a non-profit organization called World Runners; he organizes races that raise money to end hunger and poverty both locally and around the world.

Ben Pollock, VP Strategic Sales Development – AIG
Ben has over 15 years of experience working in insurance and investments. Currently, he works as Vice President, Strategic Sales Development of Annuities for AIG in the Life Brokerage division. Our focus is helping our partners navigate the intricacies of the DoL ruling, while continuing to run a successful, profitable business.

Previously, I was the National Vice President for The Altisure Group, where we developed products for our advisors and firms to help their clients reach their financial goals.

Tyson Ferney, Director of Advanced Markets – Allegis Advisor Group.
Tyson entered the business in 2000 with Lincoln Financial Advisors (LFA). He was part of the Advanced Financial Planning team which serviced fee-based advisors throughout the western United States. Areas of focus included investment management, retirement, tax planning, and estate and business planning. He also served as Regional Life Insurance and Annuity Director for LFA and the National Premium Finance Director where he coordinated and implemented designs with advisors, third party lenders, and clients' professional advisors. Tyson is married to Alicia Ferney and together they have four children (three boys and one girl on the end who rules the roost). They enjoy skiing in the winter, boating in the summer, and pretty much anything that comes with a ball.

Gary Anderson, Director, Seminar Marketing – Allegis Advisor Group.
Gary Anderson has been married to Jennifer Anderson for 26 years; they have five children ages 23 to 11. Though born and raised in Northern Utah, they have lived in Texas for the last 23 years and love it.

Gary has over 20 years of experience assisting individuals and families with their finances. He has vast experience not only with Fortune 500 companies but also with small businesses and individuals. His career and experience led him to start his own financial services company, JAG Mutual Corporation. JAG Mutual has over 1,000 clients in the central Texas area. Gary is committed to helping his clients feel confident and knowledgeable about their retirement strategies and long-term income goals.

Gary has a strong track record of protecting investments and retail marketing. As an International and Global Business Director for Nike, Inc. he was responsible for $100 Million at retail value in over 40 countries. He is also the recipient of Nike's "Focus to Grow" award. He has also worked with other Fortune 500 companies in marketing and major brand licensing around the globe.

Gary has several years of experience in successful seminar marketing as an advisor and coach. He joined Allegis Advisor Group as Director - Seminar Marketing to develop a proprietary seminar marketing platform and coach advisors to increased success.

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