

# Agenda



***The Hilton San Diego Bayfront – San Diego, CA***

## **Touchstone Investments**

**Tuesday, Feb. 14**

**9:40 a.m. – 10:30 a.m. | Breakout Session 3**

**Touchstone: 7 Essential Data Points You Didn't Know You Needed for Deliberate Growth**

**9:40 a.m. – 10:30 a.m. | Cobalt 502**

**Description:** Touchstone's PAR program is a collaborative process with Touchstone's team of analytics experts that helps to guide financial professionals in the pursuance of deliberate practice growth. The "7 Essential Data Points" presentation is an introduction to this program.

**Presenters:** Michael Jones, Assistant VP, Sales Desk, Touchstone

Todd Nuss, Vice President – Institutional Business Development, Touchstone

**Moderator:** David Richert, RVP, Ameritas

**Wednesday, Feb. 15**

**9:50 a.m. – 10:40 a.m. | Breakout Session 8**

**Touchstone: Differentiating Your Practice by Communicating your Value**

**9:50 a.m. – 10:40 a.m. | Sapphire IJMN**

**Description:** Did you know that about 33% of a financial professionals' clients only contributes to about 4% of revenue to their practice? Many financial professionals we work with have trouble executing on a client service model that is both efficient and impactful. Also, many financial professionals have difficulty showcasing their value to their clients and prospects to differentiate themselves from other financial professionals. The needs we see are that they want to strengthen their client segmentation and service model to provide efficiency to their practice as well as develop a positive and attractive view into what they can do for their clients and prospects.

**Presenters:** Michael Jones, Assistant VP, Sales Desk, Touchstone

Todd Nuss, Vice President – Institutional Business Development, Touchstone

**Moderator:** Lennie Walters, Wealth Management and Investment Services Manager, AIC and AAS