



2023 Advanced Sales Forum

August 6-9, 2023

Chicago, IL

Advanced Registration List (as of July 28, 2023)

Company Name:

AAA Life
 AAA Life
 AIG Life and Retirement
 Allianz Life
 Allianz Life
 American National
 Ameriprise Financial
 Ameriprise Financial
 Ameritas Life Insurance Corp.
 Ameritas Life Insurance Corp.
 Ashar Group, LLC
 Ashar Group, LLC
 Brighthouse Financial
 Brighthouse Financial
 Brighthouse Financial
 Brighthouse Financial
 Carson Group
 Catholic Order of Foresters
 Catholic Order of Foresters
 Catholic Order of Foresters
 Catholic Order of Foresters
 CES
 CNO Financial Group
 Delaware Life
 Delaware Life
 Delaware Life Marketing
 EQUITABLE
 Faegre Drinker Biddle & Reath LLP
 Farm Bureau Financial Services
 Federated Life Insurance Company

Full Name:

Patrick Scott
 Michael Zovath
 Daniel Spence
 Jordan Skog
 Dave Vogel
 Robert Schefft
 David Baldwin
 Catherine Egan
 Jacob Messick
 Wendell Stallings
 Jason Mendelsohn
 Jamie Mendelsohn
 Andre Dowtin
 Thomas Rowley
 Kevin Russ
 Gregory VanMarter
 Jamie Hopkins
 Matt Korienek
 Jay Sweeney
 Geno Turek
 Mark Walsworth
 Randall O'Brien
 Mark Snyder
 Val Sender
 Anders Smith
 Deborah Miner
 Peter Cyr
 Bradford Campbell
 Erin Herbold-Swalwell
 Ashley Thon

Job Title:

Sr. Regional Field Support
 Senior Manager
 Director, Advanced Sales
 Senior Advanced Markets Consultant
 Senior Advanced Markets Consultant
 Vice President
 Director of Advanced Strategies
 Director, Advanced Strategies Marketing
 Case Design Consultant – Advanced Solutions & Design
 Sales Director - Advanced Solutions & Design
 President
 Executive Vice President
 Sr Investment Consultant
 Advanced Market Group
 Director, Advanced Markets Group
 Sales Manager
 Director of Retirement Research
 Senior Product Actuary
 Manager of Professional Development
 VP, Field Distribution Services
 Executive Vice President/Chief Marketing Officer
 Director, CES
 Associate General Counsel
 Internal Sales Manager, AVP
 Managing Director, National Sales Consultant
 Vice President, National Sales Consulting
 Director Advanced Markets
 Partner
 Senior Counsel-Advanced Markets
 Advanced Life Supervisor & Counsel

Finseca	Alex Kim	VP, Public Policy
Global Atlantic	Thea Marasa-Scafidi	VP, Advanced Markets
Global Atlantic	Carla Urbaszewski	AVP Advanced Markets
Guardian Life	Desiree Day	Advanced Markets Consultant
Hebets	Derek Welch	Vice President and General Counsel
Hoopis	Joey Davenport	President
Hoopis	Josh Dunham	VP of Sales
Jackson National Distributors, LLC	Chris Bogren	Assistant Vice President
John Hancock	Ana Canelos	Director
John Hancock	Tracey Ullom	Associate Counsel
Keebler and Associates	Robert Keebler	Partner/Certified Public Accountant
Kroll	William Rolack	Chief Inclusion and Diversity Officer
LIMRA and LOMA	Chris Callahan	Member Relations Director
LIMRA and LOMA	Susan Mancarella	Senior Event Planner
LIMRA and LOMA	Tamu McCreary	CVP, Conference and Committee Strategy
LIMRA and LOMA	Emma Wandzy	Conference Coordinator
LIMRA and LOMA	Faye Williamson	Member Relations Director
Lincoln Financial Distributors	Christopher Price	AVP, Advanced Sales/Business Development
Lincoln Financial Group	Timothy O'Connell	Director, Advanced Sales
Littman Krooks LLP	Amy O'Hara	Partner, Attorney
LPL Financial	Kimberly Shocklee	AVP - Business Development
MassMutual	Tom Barrett	Advanced Sales
MassMutual	Samuel Barton	Advanced Sales Consultant
MassMutual	Todd Janower	Advanced Sales Consultant
Melvin A. Warshaw, Esq.	Melvin Warshaw	Attorney
Mindset Digital	Debra Jasper	Founder and CEO
MNF Legal PLLC	Severiano Ortiz	Managing Member
Mutual of Omaha	Stephen Alloy	Advanced Markets Consultant
Mutual of Omaha	Michelle Owens	Advanced Markets Specialist
National Life	David Hayward	Advanced Sales Specialist
Nationwide	Benjamin Ayers	Senior Economist
Nationwide	Shawn Britt	Director, LTC Initiatives, Advanced Consulting Group
Nationwide	Carlo Cordasco	Associate Vice President
Nationwide	Allison Hoyt	Technical Director
New York Life	Jeanmarie Holm	Corporate Vice President
Northwestern Mutual	Tom Anderson	Senior Director Strategic Planning Services
Northwestern Mutual	Matthew Johnston	Senior Director - Sophisticated Planning Strategies
Pacific Life	Monica Rhee	Director
Penn Mutual	George Bradley	Director - New Business Development
Penn Mutual	Amy Bryant	Director Advanced Markets
Penn Mutual	Jon Ernst	Life Product Wholesaler
PGI Partners	Chris Sizemore	Senior Vice President, Managing Partner
Principal Financial Group	Polina Engel	Director-Advanced Solutions
Principal Financial Group	Scott Van Wyngarden	Advanced Markets
Prudential	Christina Cuffari	Vice President Advanced Planning, Sales Technology
Prudential	Donna Scalaro	Vice President, Advanced Planning
Prudential	Stephanie Winiarski	Director, Advanced Planning
Sammons Financial Group	Christopher Regione	AVP, Chief Underwriter
Sammons Financial Group	Andrew Rinn	Vice President-Advanced Strategies
Securian Financial	Wade Allen	Executive Benefits Strategy Consultant
Securian Financial	Ann Hagerty	Advanced Sales Counsel
Securian Financial	Natalia Keene	Advanced Sales Counsel

Securian Financial	Channing Schmidt	Advanced Sales Director
Security Mutual Life	Victor Ngai	Vice President-Advanced Marketing
Security Mutual Life	William Rainaldi	Senior Financial Services Consultant
State Farm	Ronald Coppenbarger	Agency Consultant
State Farm	Adam Sheehan	Advanced Planning & Sales Support Consultant
Succession Capital Alliance	Michael Rothman	Chief Distribution Officer
Thrivent	Michael Guizzetti	Advanced Markets Consultant
Transamerica Capital	Ryan Bertrand	Vice President and Managing Director Advanced Markets
Tritium Private Wealth Strategies, LLC	Zacharie Levine	Managing Director
Vymo	Candace Baldrige	Senior Sales Director
Vymo	John Behn	National Sales Director
Western & Southern Financial Group	Beady Waddell	Vice President of Advanced Markets
Wintrust Life Finance	Alexander Cano	Chief Executive Officer
Wintrust Life Finance	Nate Preuss	Vice President