



Subject Matter Experts Bio and Background 行业专家背景和简历



Selling to Contemporary High Net Worth Prospects

如何向当代高净值客户销售

- ➔ Identifying with Your Purpose 认同你的目标 (17:02) - Manny Amezcua 曼努埃尔 阿梅兹库阿
- ➔ Using the Power of Why in Your Approach 善用提问的力量(14:15) - Randy Taylor 兰迪 泰勒
- ➔ Mindset of Today's Consumer: Bridging the Procrastination & Trust Gap 当今消费者的心态：弥
拖延与信任的鸿沟 (8:05) - Joey Davenport 乔伊 达文波特
- ➔ The Link Between Mental Wellness and Financial Wellness 心理健康与财务健康之间的联系 (8:41)
Jane Blaufus 简 布劳福斯
- ➔ Interweaving Virtual Networking with Traditional Networking将网络社交与传统社交相互交织 (5:11)
- David Fisher 戴维 费舍

David J.P. Fisher 戴维-费舍

Sales Hall of Fame Inductee, Speaker, #1 Best Selling Author, & Coach

专业主旨演讲人、教练、最佳畅销书作家，入选销售名人堂

David J.P. Fisher (D. Fish) is a sales expert, professional keynote speaker, and best-selling author. Building on over 20 years of experience as an entrepreneur and sales professional, he combines nuanced strategy and real-world tactics to guide individuals and organizations as they navigate and leverage the evolving landscape of sales.

戴维-费舍是一位销售领域的专家，同时也是专业主旨演讲人和畅销书作者。他凭借二十多年的企业经营和销售专业经验，通过将定制化战略和实际战术的结合，为个人和企业适应不断变化的销售环境时提供指导。



He has built a career that spans many different areas, from sales and entrepreneurship to marketing and personal growth. And in doing so, he's noticed that the world has continued to become more and more interconnected. That's why he focuses a lot of his work on the growing slice of business where digital selling, relationship-building, and old-school sales skills converge. David's goal is to help create sustainable business growth by enabling those he works with to build robust relationships with their clients and prospects relationships that lead to more opportunities, easier conversations, and faster sales cycles.

他的职业生涯跨越了许多不同的领域，从销售、创业到营销和私人培训。通过这样的丰富经历，他意识到世界正变得越来越互通互联，于是他将工作重心放在了如何将数字销售、建立关系和传统的销售技巧融合来推动业务增长。戴维的目标是：通过让合作伙伴与他们的客户和潜在客户建立牢固的关系，来帮助他们创造可持续的业务增长，因为这种牢固的关系可以带来更多机会、更轻松的对话和更快的销售节奏。

David is a thought leader and has written extensively on both online and offline relationship-building and business development. He's the author of 12 best-selling books in the Networking in the 21st Century series as well as Hyper-Connected Selling. He is a contributing influencer to the LinkedIn Sales and Marketing Blogs, Sales Hacker's Blog, and the Hubspot Sales Blog and he has contributed to sites such as The Social Media Examiner, Forbes, and Spin Sucks. He is also the creator and host of the Beer, Beats, & Business Podcast – where he gets the opportunity to interview leading experts, entrepreneurs, and authors.

戴维是一位意见领袖，在线上和线下的关系建立和业务发展领域都有大量的著作。他在《二十一世纪的社交》（Networking in the 21st Century）系列、以及《虚拟互连的销售》（Hyper-Connected Selling）中著有十二本畅销书。他在领英的几个重要板块，如营销博客、Sales Hacker博客和Hubspot销售博客上都很具影响力，The Social Media Examiner社交媒体检验者、福布斯（Forbes）和Spin Sucks等知名网站也发表过他的文章。他还是“啤酒、打击乐和做生意”（Beer, Beats, & Business）播客栏目的创始人和主持人，他通过这个播客来采访顶尖的行业专家、企业家和作家等。

Jane Blaufus 简-布劳福斯

Author, International Speaker, and Business Coach

作家、国际演讲者、商务教练

Jane Blaufus is the bestselling author of the book WITH THE [STROKE] OF A PEN: Claim your life. Her book and companion planning binder have become recognized as two of the most comprehensive, actionable, personal and financial planning resources available today for families, individuals and business owners alike.

简-布劳福斯是畅销书《大笔挥就你的人生 WITH THE STROKE OF A PEN: Claim your life》的作者。她所著的这本书和配套规划册已被公认为适用于当今家庭、个人和企业主的两个最全面、最具实操性的个人财务规划资源。



She brings to the table 25+ years of insurance expertise as a financial advisor, sales manager, and executive responsible for the development, delivery, and implementation of recruiting and selection processes and sales and marketing training to thousands of people in the sales force. Today she is the Principal of The Blaufus Group Inc., based in Toronto, Canada where she consults extensively into the financial services industry.

简拥有超过二十五年的保险专业经验，曾经担任过财务顾问、销售经理及公司高管，负责制定并实施招募和选拔流程，并为数千名销售人员提供销售和营销培训。如今，她是位于加拿大多伦多的布劳福斯集团公司的负责人，她的公司主要专注于金融服务行业的咨询业务。

Jane is a sought-after international keynote speaker delivering a highly rated MDRT Vancouver 2016 session and was showcased in the ROUND the TABLE magazine 2016 Annual Meeting Highlights. She was also a featured speaker on the main platform at the MDRT PEAK 2017 Convention in Pattaya, Thailand. Jane is a frequent guest expert on national TV/Radio, and a Huffington Post blogger.

简是一位备受欢迎的国际主旨演讲家，在2016年温哥华MDRT百万圆桌会议上的演讲备受好评，并登上当年会议精选回顾的圆桌杂志。她也是2017年在泰国芭堤雅举行的MDRT百万圆桌高峰会主会场上的特邀演讲嘉宾。简也是美国国家电视台和电台的客座专家，也是《Huffington Post》的博主。

Her reputation and expertise make her an influential coach to many financial services professionals across Canada and the United States. Jane believes that to excel in today's marketplace, the key to success is relationship building and she walks the walk and talks the talk.

简的声誉和专业经验使她成为加拿大和美国许多金融服务专业人士的有影响力的教练。简的理念是，要在当今的市场中脱颖而出，成功的关键是建立关系，她也是这样身体力行的。

Joey Davenport, CLU, CLF

President of Hoopis Performance Network

乔伊·达文波特

Joey is President of the Hoopis Performance Network in Chicago. He has over twenty years of experience in the financial services industry as a producer, manager, entrepreneur and international speaker. His organization, the Hoopis Performance Network, was recognized for the 3rd year in a row by Inc. 5000 as one of the fastest growing privately held businesses in the U.S.

乔伊是芝加哥Hoopis Performance Network公司的总裁。他在金融服务业拥有超过二十年的经验，担任销售、经理、企业家和国际演说家。他的公司Hoopis Performance Network连续三年被Inc.5000评为美国增长最快的私营企业之一。



As a Certified Trainer and Master Coach, he is considered the Executive Producer of Northwestern Mutual's Enduring Relationships program and the Hoopis University. He is also one of the principal authors and co-producers of the advanced salestraining program, Factfinding DNA. Joey is co-author of the #1 best-selling book, "The Power of Coaching: Engaging Excellence in Others." He is the executive producer of the award-winning Trustworthy Selling sales effectiveness program developed with LIMRA International and the Advanced Planning Channel. His web-based training programs have received top recognition including multiple Digital Media Innovators Awards and the ROI Institute's Top 10 Case Studies.

作为一名认证培训讲师和首席教练，他是美国西北互助人寿的《持久关系建立》培训项目Hoopis大学方的制作人。他也是高级销售培训项目《植入基因的事实发现》的主要创作人和联合制作人之一。乔伊还是最佳畅销书《教练的力量：让他人取得卓越成就》（The Power of Coaching: Engaging Excellence in Others）的作者之一。他还是“值得信赖的销售”（Trustworthy Selling）销售效能培训课程的执行制片人，这一培训是Hoopis大学与LIMRA和Advanced Planning Channel共同开发并屡获殊荣的培训项目。他主导的网络培训项目获得了包括数字媒体创新者奖（Digital Media Innovators Awards）和 ROI 研究所的最佳十大案例研究在内的诸多业界认可。

Joey is Past President of NAIFA Chicago and a graduate of NAIFA's Leadership in Life Institute. He received the NAIFA Illinois Young Advisors Team Leader of the Year award and the Jack E. Bobo Award for Association Excellence from the NAIFA Federation.

乔伊是芝加哥NAIFA的前任总裁，毕业于NAIFA寿险领导力学院。他获得了NAIFA伊利诺伊州青年顾问团队年度领袖奖、以及NAIFA协会颁发的Jack E. Bobo卓越奖。

Joey lives in Chicago with his wife Lyndy and their 13 year old son William. He enjoys spending time with his family, traveling and playing music in his blues/rock band Hot LZ.

乔伊和妻子琳蒂以及他们十三岁的儿子威廉姆居住在芝加哥。他喜欢和家人在一起，喜欢旅游，还有自己的蓝调/摇滚乐队Hot LZ。

Manuel Amezcua 曼努埃尔-阿梅兹库阿

Keynote Speaker, Performance Coach and Author

万通保险五大湖区 总经理兼首席执行官

Manuel Amezcua is an entrepreneur, philanthropist, and executive in the wealth management and insurance industry. He currently serves as CEO for MassMutual Great Lakes, one of the leading brands in creating financial security, stability, and success on behalf of those it serves in the United States. Manuel is also the founder of Podium Risk Management which has a concentrated focus on serving professional athletes, business owners, and CEOs. Within Manuel's four-year span leading MassMutual Great Lakes, the firm has sponsored and supported over 60 nonprofit organizations and been recognized on Metro Detroit's Best & Brightest Companies to Work For' list annually since 2018, as well as Crain's Detroit Business 'Cool Places to Work in Michigan' list in 2019 and 2021.



阿梅兹库阿是财富管理和保险行业的企业家、慈善家和高管。他目前担任万通保险五大湖区的首席执行官。万通保险在美国是为服务对象创造安全、稳定和成功的财务状况的标杆企业。曼努埃尔还是 Podium 风险管理公司的创始人，该公司专注于为职业运动员、企业主和首席执行官提供服务。在曼努埃尔领导万通五大湖区的四年时间里，该公司赞助支持了六十多个非营利组织。自 2018 年以来每年都登上底特律都会区的“最佳和最具有发展前景的雇主”名单，以及Crain's Detroit Business 2019和2021的“密歇根州最酷职场”名单，获得业界极大认可。

Manuel has been recognized each year since 2019 as one of Detroit's 500 'Most Powerful Business Leaders in Metro Detroit by Business Magazine, received the 2019 Huebner Service Award from the Society of Financial Services Professionals Detroit Chapter and MassMutual's national Community Service Award in 2015 and 2019. During his professional career, he has spoken at more than 50 conferences and companies across the country. His conversations focus on developing a clear brand and value proposition, working intentionally from a written plan, and having relentless hustle. He believes some of the greatest professional skill sets are the ones we learned as children: be polite, remember and use a person's name, ask for permission, and give compliments because being kind is cool.

自 2019 年以来，曼努埃尔每年都被商业杂志评为底特律 500 位“底特律最有影响力的商业领袖”之一，曾获得金融服务专业人士协会底特律分会颁发的 2019 年 Huebner 服务奖，以及2015年和2019年万通的全国社区服务奖。在他的职业生涯中，他曾在全国五十多场会议或公司中发表演讲。他的演讲重点是：打造清晰的品牌和价值主张，有意识地按照事先的计划工作，并坚持不懈地努力。他的信念是：一些最有用的专业技能是在我们小时候学到的，比如，懂礼貌，记住他人的名字并在打招呼时使用，事先征求许可，不吝啬赞美，这些都是善良品质的体现。

Randy Taylor 兰迪-泰勒

Keynote Speaker, Performance Coach and Author

主旨演讲人，绩效教练，作家

Randy Taylor's story is remarkable. His ability to connect with audiences and create lasting change is truly extraordinary.

Extensive study over 30 years into the science of human behavior has allowed him to become one of the nations leading experts in human potential and leadership. Having escaped poverty, parent alcoholism and life on the streets Randy was able to overcome incredible odds. Beginning at age 28 he began a 20-year career that propelled him to the very top in Canadian broadcasting at CFRB 1010 and as the host of Summit of Life on Global Television. His level of expertise has won him several national broadcast awards. Twelve years ago Randy left broadcasting to form Taylor made leadership.



兰迪-泰勒的背景很精彩。他与观众沟通并产生深远影响的能力确实非同寻常。三十多年来对人类行为科学的广泛研究，使他成为了在人类潜力挖掘和领导力发展领域首屈一指的专家。兰迪曾经历过贫困、家长酗酒和浪迹街头的一系列苦难，但这一切使他如今能够克服任何难以置信的困难。他从二十八岁开始的广播职业生涯迄今已经超过二十年，他在加拿大电台 **CFRB 1010** 上成为了加拿大广播界的佼佼者，并担任全球电视（Global Television）Summit of Life栏目的主持人。他的专业水平为他赢得了多个国家广播奖。十二年前，兰迪离开了广播公司，组建了以他的姓氏命名的泰勒领导力咨询公司。

Through his own personal experience and study for over thirty years, he has developed a dynamic new leadership and personal development process called "The Winner Within". This program has received national endorsement from six of the largest companies in Canada. He is quickly gaining notoriety among some of the top corporations and associations in North America. His client list includes Manulife, McMaster University, London Life, Investors Group, Motorola, Aim Trimark, Xerox, Empire Life, ReMax Realty, Petro Canada, Kraft Foods, Industrial Alliance, Freedom 55 Financial, The Government of Canada, Brookfield Homes, Toronto Employment Services and many more.

通过三十多年的个人经验和学习，兰迪开发了一个充满活力的新型领导力和个人发展课程，称为“内在赢家”（The Winner Within）。该课程已在国内获得了加拿大六家最大公司的认可。他也很快在北美一些大公司和协会中声名鹊起。他的客户名单包括加拿大的宏利（Manulife）、McMaster大学、伦敦人寿（London Life）、显达理财集团（Investors Group）、摩托罗拉、Aim Trimark、施乐、帝国人寿（Empire Life）、ReMax Realty、加拿大石油公司、卡夫食品、国联保险（Industrial Alliance）、Freedom 55 Financial、加拿大政府、Brookfield Homes、多伦多就业中心等等。