NAIFA
Northern California

Advisors Expo

Friday, March 11, 2016 • 8:30 am - 2:30 pm

Citrus Heights Community Center • 6300 Fountain Square Dr, Citrus Heights, CA

Make an investment in your career and attend the NAIFA Northern California Advisors Expo. We have a great line up of speakers who will save you money, make you money, protect your career and take your career to the next level. Also, throughout the event we'll share with you real life stories demonstrating the important work we do in this industry inspiring you to continue making a difference in your clients' lives. You'll also have the opportunity to visit with industry vendors who will share with you the latest in products and services.

Schedule

8:30 am Registration and Breakfast with the Exhibitors
Breakfast sponsored by DI & LTC Insurance Services

9:00 am Opening

9:15 am **Maine Shafer**
"Proven Business Tax Strategies for the Insurance & Financial Professional"
It's not how much you make, but how much you keep. Even if you have a great bookkeeper or CPA handling your taxes, that person is not involved in the day-to-day decisions that can mean keeping or losing thousands of dollars over the year. You'll learn to maximize allowable deductions, how to avoid an audit and identify overlooked working capital.

10:30 am Exhibitor Break

10:50 am **Randall Boll, CFP, CLU, ChFC, CLTC, CRPS**
"The Power of Narrative Building"
Embracing a positive transformation which yields a focus on your solutions rather than problems through the discovery of your own authentic reality.

11:50 pm Exhibitor Break and Lunch

12:30 pm **Shari McHugh**
"2016 Legislative and Regulatory Overview: How NAIFA California is helping you stay in business"

1:00 pm **Eszylfie Taylor**
"Failure is not an Option"
The story of my successes and failures, and how I overcame challenges by simplifying the sales process on my way to becoming a Top of the Table producer.

2:30 pm Exhibitor Raffle & Closing

Registration

or sign-up online at www.naifanorcal.org

Cost: **$60 if paid by February 29th**. $75 if paid after February 29th. Includes continental breakfast and lunch.

Method of Payment:
❑ MC ❑ Visa ❑ Am Exp ❑ Check (payable to NAIFA Nor Cal)

Credit Card #: ______________________________

Expiration Date: __________ Billing Zip Code: ____________

Card Holder Name: ______________________________

Signature: ______________________________

Return by March 8th to:
NAIFA Northern California, PO Box 2698, Lodi, CA 95241
(209) 339-4651, Fax (209) 339-8273; info@naifanorcal.org
No refunds. Registration is transferable.
www.naifanorcal.org

Name: ______________________________

Company: ______________________________

Address: ______________________________

City/State/Zip: ______________________________

Phone: ______________________________

Email: ______________________________

2016 Advisors Expo Speakers

NAIFA Northern California

Eszylfie Taylor

President, Taylor Insurance & Financial Services
Creator, The Taylor Method

Eszylfie Taylor is the founder and president of Taylor Insurance and Financial Services located in the financial district of Pasadena, California, and serves as financial advisor to individuals, business owners, and high net worth families. He attended Concordia University on a basketball scholarship and graduated Magna Cum Laude with a Bachelor's Degree in Business Management. Prior to founding his own company, he was a standout financial advisor at New York Life, finishing his career there as the highest producing advisor in the history of the African American market.

During his first two years at New York Life, Eszylfie Taylor made approximately $55,000 and $58,000, respectively. In year three, he had a breakthrough, and nearly tripled his income from the previous year. This breakthrough centered around how to improve his market and focus on solving problems, not selling products. Naturally, he built upon this and used his successes and failures as teaching tools that would contribute to the start of ***The Taylor Method***, a sales training system for financial advisors. Over the next decade, Eszylfie mentored countless agents, helping them find success and prosperity in the business.

Today, Mr. Taylor is a Million Dollar Round Table *Top of the Table* producer, which places him in the top 1% of advisors worldwide. In 2015, he won NAIFA's Advisor Today *Top 4 Under Forty* award.

Through all the success, Eszylfie has continued to contribute to his community. Since 2003, his nonprofit, Future Stars, has been hosting a basketball camp for underserved youth in the community, instilling in them the tools he uses to achieve success: hard work, perseverance, integrity, and sacrifice.

Randall Boll, CFP, CLU, ChFC, CLTC, CRPS

Financial Advisor, Advanced Financial Strategies Team, Pacific Advisors

Randy specializes in tax efficient asset accumulation for shareholders through the use of executive compensation and income offset strategies. He has worked with his team of specialists to help owners and executives across hundreds of companies on complex financial concerns, including executive compensation, corporate formation structuring, exit planning, asset protection, estate preservations, income distribution, charitable and alternative tax strategies.

Randy is a n industry leader and involved in numerous financial industry and business organizations including AALU, NAIFA, FSP. He routinely trains other professionals, specialists and advisors on corporate planning strategies and has earned rigorous financial designations.

After completing the Landmark Forum in 2015, Randy has become heavily involved in the organization volunteering his time, as well as mentoring of up-and-coming Landmark participants. When not in the office, Randy can be found on the golf course, enjoying a glass of wine with family and friends or giving back through various charitable organizations such as American Cancer Society and Dayton House of Bread. Randy and his fiancee Bret are residents of Irvine, CA and are expecting their first child in 2016.

Shari McHugh

NAIFA-California Legislative Advocate

Shari has over 16 years successful experience in government affairs and public relations. She is currently a partner in the lobbying firm of McHugh, Koepke & Associates. Shari's lead clients include the California Credit Union League, the Hartford, the National Association of Insurance & Financial Advisors of California, the Pacific Association of Domestic Insurance Companies, and the Pechanga Band of Luiseno Mission Indians.

Prior to joining McHugh, Koepke & Associates, Shari was the Senior Vice President for the Coalition of California Insurance Professionals (CCIP). Shari was responsible for overseeing and implementing the lobbying and regulatory agenda developed by CCIP's Steering Committee. She served as staff liaison to the various task forces and steering committees of coalition partners.

Prior to joining CCIP, Shari was the Senior Vice President of PIA. As staff liaison to PIA's Public Affairs Committee, she managed the formulation and implementation of PIA's legislative program and worked with officials from the DOI on regulatory issues. She was also responsible for PIA's grassroots network and media program.

Shari has worked diligently over the years to develop and maintain working relationships with legislators, legislative staff, regulatory officials, administration representatives, lobbyists, media personnel and industry representatives. Her work in helping to establish and grow PIA's government and public affairs department earned Shari a Presidential Citation award in 1996 in recognition of meritorious efforts and achievements.

Prior to working with PIA, Shari served as a legislative aide for Melendez Associates, a Sacramento-based lobbying firm, where she worked on issues for major California employers such as ARCO, E & J Gallo Winery and the Port of Long Beach.

Shari graduated from California State University Sacramento with a Bachelor's degree in Political Communication and Government.

Maine Shafer

Bradford and Company, Inc.

Maine Shafer, J.D, has more than 15 years' experience as a professional speaker delivering tax reduction strategies on behalf of Bradford and Company, Inc. Maine consistently earns student evaluation ratings in excess of 9.65 on a scale of 1to 10, a testament to his ability to make taxes a cash resource for participants.

Maine's strong background in taxes started when he worked on the staff of a U.S. Senator on Capitol Hill, while receiving his Juris Doctorate from Georgetown University Law Center. His tax education continued during his clerkship with the Chief Judge of the Eighth Circuit Court of Appeals and while working as an Assistant Attorney General for the State of New Mexico.

Maine's platform abilities have involved not only making tax information clear and usable, but also delivering sales and motivational speeches and programs throughout the Western United States and hosting a radio talk show.