

NAUTILUS ANNUAL MEETING

May 15 - 17, 2024 • Marriott Town Center



THE NAUTILUS GROUP®

Welcome to The Nautilus Group's 30th Annual Meeting!

It is an honor to be celebrating this milestone meeting with you, back in our familiar home at the Plano Marriott. We've put together an exciting lineup of speakers and workshops designed to hone your skills, share best practices, and provide ideas to help you become even more successful. As you all know so well, the true value of an event like this is not just within the structured sessions, but also during the breaks, dinners, and post-meeting conversations that you have amongst yourselves.

Please take full advantage of your time here this week and all the opportunities for networking and learning – the synergy this group creates is always amazing and I'm so happy that you are here to be a part of it!



Contents

Nautilus Annual Meeting FAQs	3
Conference Center map	4
Meeting agenda and speaker bios	
Pre-meeting sessions	
Tuesday, May 14	5
Wednesday morning, May 15	5
Nautilus Annual Meeting	
Wednesday afternoon, May 15	6
Thursday, May 16	8
Thursday afternoon breakout workshops	11
Breakout workshop speakers	10
Friday, May 17	13
Meeting attendees list	14

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Nautilus Annual Meeting - FAQs



What is the Wi-Fi password?

Nautilus2024



Can I talk to a Nautilus consultant about my case / client / prospect?

Yes! Nautilus case consultants will be holding open office hours on:

- Wednesday morning from 9-11:30 am in the San Antonio room (on the 2nd floor).
- Thursday afternoon from 4 - 5 pm in the San Jacinto room.



Where can I download copies of the presentation materials?

Handouts and other meeting presentation materials that are approved for distribution can be downloaded [here](#). (Note that not all speakers agree to share copies of their

presentations.) See Darla Bean or Megan Hogan if you need additional assistance.



Where can I make copies or print a document?

Please understand Nautilus staff members are not equipped to provide administrative support services while at the meeting

venue. Should you need copies made or something printed from your computer, please use the Marriott's business center; the hotel staff will be happy to assist you as needed.



Can I change my restaurant for the Nautilus Night Out dine-around?

All registered attendees who chose to attend a hosted dinner were assigned restaurants for the Nautilus Night Out

based on the choices made during registration.

Nautilus staff works with each restaurant to provide an enjoyable dining experience for a predetermined number of guests. Changes to the expected number of guests results in a disruption of this service and thus, cannot be accommodated. We appreciate your understanding.

Note: Those who registered to attend a hosted dinner and do not show up at their assigned restaurant will be charged a \$125 no-show fee. The affiliated Nautilus Member or Home Office cost center will be charged. Your participation in this event is voluntary, not required or expected by New York Life, and it is not necessary to incur these expenses to perform your duties at New York Life. If you choose to participate, you authorize the related expenses that you are voluntarily incurring to be debited from your agent ledger, and you understand that such expenses will not be reimbursed, and such debits will be included in the calculation of your periodic compensation, as shown on your ledger.

Where can I get medical assistance?

There is a medical clinic available and a physician on call for the duration of the meeting. The medical clinic is located in the Red River room, across from the information table and conference ballroom.



Clinic hours:

Tuesday	8 am - 5 pm
Wednesday	8 am - 5 pm
Thursday	8 am - 5 pm
Friday	8 am - 12 pm

After hours, you can reach Dr. Jennifer Johnson at 904-428-8162.

Can you help me with my hotel room or hotel bill?

Questions and concerns about your hotel room or your hotel bill should be directed to the Marriott staff at the front desk of the hotel. The Nautilus staff is not able to assist with individual room or billing issues.



Where can I store my luggage after I check out of the hotel on Friday?

The Pecos and San Jacinto rooms will be available on Friday morning if you need temporary luggage storage between hotel check out and departure.

- If you plan to take the bus to DFW, store your luggage in the San Jacinto room.
- If you plan to take the bus to Love Field, store your luggage in the Pecos room.



You must claim your bags by 12:30 pm on Friday, May 17.

Where can I get transportation to the airport?

Complimentary buses will leave for both DFW Airport and Love Field at 12:30 pm on Friday from the Marriott. For individual transportation arrangements, please inquire at the valet stand outside the front door of the hotel.



Where can I charge my phone/tablet?

Power strips are available at the back of the Trinity River ballroom for your convenience. (You will need to have your own charger to plug in.) Note that these power strips will not be monitored or attended, so please take care when leaving and retrieving your personal devices. Neither Nautilus nor Marriott can be responsible for lost or damaged items.

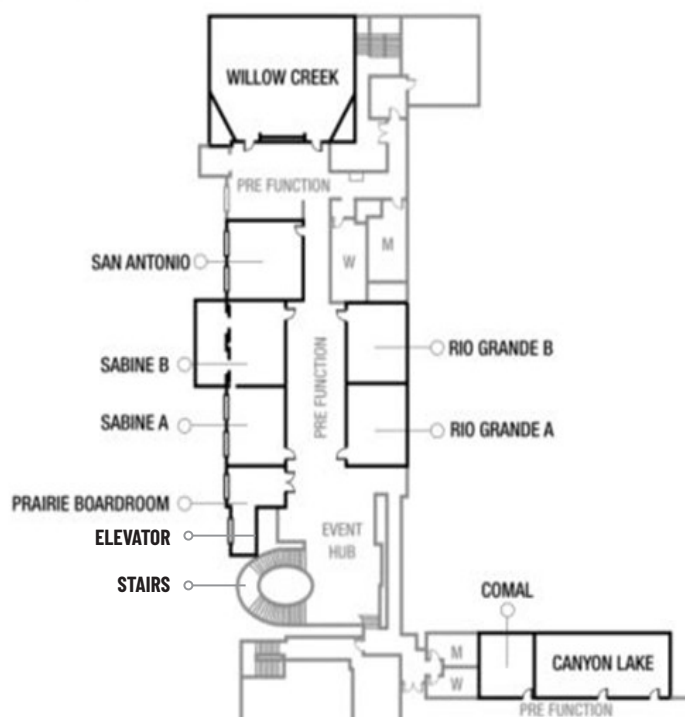


Marriott Conference Center

Level 1 - Ground floor



Level 2 - Second floor



Pre-meeting sessions - Tuesday, May 14th

9:00 am Check-in table open in Trinity foyer 9 am – 5 pm

	Nautilus Plus Members in San Jacinto	Nautilus Board Members
12:00 pm	Lunch for Nautilus Plus Members only 12 – 1 pm	
1:00 pm	Idea Sharing for Nautilus Plus Members only 1 – 5 pm	
5:00 pm	Break	
5:30 pm	Reception for Nautilus Plus Members in Suite 221 5:30 – 6:30 pm	Reception for Nautilus Board Members in Suite 221 5:30 – 6:30 pm
6:30 pm	Nautilus Plus Members only dinner Hosted by Matt Pate 6:30 – 9:45 pm	Nautilus Board Members dinner Hosted by Mark Scozzafava 6:30 – 9:45 pm

Pre-meeting sessions - Wednesday morning, May 15th

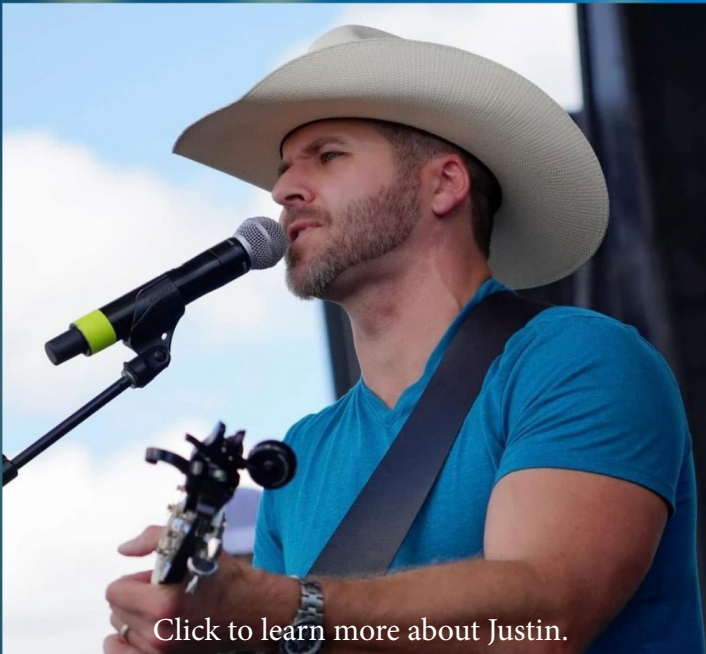
7:00 am	Check-in table open in Trinity foyer 7 am - 5 pm				
7:30 - 8:30 am	Breakfast in Trinity I				
	Nautilus Plus Members Only in San Jacinto	Nautilus Coaching Series in Sabine (on 2 nd floor)	Marketing & Practice Management in Willow Creek (on 2 nd floor)	Nautilus Board Members in Canyon Lake (on 2 nd floor)	Nautilus Case Development in San Antonio (on 2 nd floor)
7:30 am	Nautilus Plus Members breakfast Idea Sharing for Nautilus Plus Members only Hosted by Matt Pate 8:30 am – 12 pm	Nautilus Coaching Series with Allen Hensley and Jeff Klein By invitation only 8:30 – 11:30 am	Marketing Overview 9 – 9:30 am Practice Management: Client Meeting Process 9:30 – 10:30 am Practice Management: Business Operations 10:30 – 11:30 am	Nautilus Board meeting 8:00 – 10:00 am	Nautilus Case Development team Open office hours 9 – 11:30 am
8:00 am					
8:30 am					
9:00 am					
9:30 am					
10:30 am					
12:00 pm	Lunch for Nautilus Plus Members only outside San Jacinto 12 -1 pm				
	New Member Lunch with Nautilus board, Next Gen committee, and Nautilus leadership team By invitation only. Grab your lunch from the buffet and meet in Pecos. 12 – 12:45 pm				
	Lunch in Trinity I for all attendees 12 – 1 pm				

True Country Music Entertainer

Justin Mason

Nautilus Night In

Performance starts at 6:30 p.m.



Click to learn more about Justin.

Nautilus Annual Meeting - Wednesday afternoon, May 15th

MC: Jason Apolenis

Main platform presentations in Trinity River Ballroom	
1:00 pm	"Opening Remarks" Mark Scozzafava, VP, Field Productivity Value Stream CEO, The Nautilus Group 1 – 1:30 pm
1:30 pm	"Master your Mind, Master your Life" Dandapani 1:30 – 2:30 pm
2:30 pm	Break
Main platform presentation in Trinity River Ballroom	
3:00 pm	"Deepening Relationships through Effective Client Discovery" John Nersesian, CFP®, CIMA®, CPWA® Head of Advisor Education, U.S. Global Wealth Management, PIMCO 3 – 4 pm
	"Hiring and Building Your Team Using Kolbe" Sarah Frances Trampe CVP, Practice Management - Model Office 3 – 4 pm in Willow Creek (on 2 nd floor)
Main platform presentation in Trinity River Ballroom	
4:00 pm	"The Trust Business: Secrets from an FBI Hostage Negotiator" Chris Voss Founder and CEO of The Black Swan Group Ltd 4 – 5 pm
5:00 pm	Break
6:00 pm	Nautilus Night In – Celebrating the 30th Nautilus Annual Meeting Reception in Trinity foyer 6 – 6:30 pm Dinner in Trinity I 6:30 – 9 pm

Wednesday speakers *(In order of appearance)*



Mark Scozzafava

VP, Field Productivity Value Stream
CEO, The Nautilus Group

Mark is Chief Executive Officer of The Nautilus Group. He oversees the Nautilus staff of nearly 40 highly credentialed professionals to ensure the 230+ Nautilus Members have what they need to stay competitive

in the marketplace. Mark joined New York Life in 2006 as a management associate with rotations in the Agency Distribution department and as Chief of Staff for the COO of New York Life International. He then moved to Eagle

Strategies and led a team responsible for supporting and growing the integration of life insurance and investments. Mark also worked in the Life Product Management division, where he was responsible for identifying trends and opportunities for growth, supporting external wholesaling teams, and creating short-term programs to influence field activity. He also has led a team responsible for driving incremental life insurance sales in the Northeast Zone and the Planning & Sales Strategy team. Mark earned a bachelor of arts degree from the University of Michigan and an MBA from Columbia Business School, and is a graduate of New York Life's Accelerated Leadership Program. In his spare time, Mark enjoys cooking fancy meals for family and friends, skiing with his children, and rooting for Michigan football.



Dandapani

Hindu Priest, Entrepreneur,
Former Monk

Dandapani is a Hindu priest, entrepreneur and a former monk of 10 years. After graduating university with a degree in Electrical Engineering he left it all behind to become a Hindu

monk under the guidance of one of Hinduism's foremost spiritual leaders of our time, Sivaya Subramuniyaswami. For 10 years he lived a life of serious personal discipline and training at his guru's cloistered monastery in Hawaii. When his vows expired, he chose to venture out into the world making New York City his home. He works with entrepreneurs and some of the top athletes in the world in helping them understand and leverage their mind so that they can be the best at what they do. He does this by empowering them with tools and teachings that have been used by Hindu monks of his tradition for thousands of years. His TEDx talk has more than 5.6 million views and both his GoalCast videos garnered over a total of 75 million views in just five months. He and his wife are passionately creating a 33-acre Hindu spiritual sanctuary and botanical garden in Costa Rica to further their mission.

Management Analyst education programs held at Yale University and The University of Chicago. John has 37 years of investment and financial services experience and holds an undergraduate degree in business and economics from Lehigh University.



Sarah Frances Trampe, MBA

Corporate Vice President
The Nautilus Group®

Sarah Frances Trampe joined Nautilus in 2010 and manages the Model Office program. She assists Nautilus Members and their associates with back office efficiency, annual business planning, and strategic marketing.

Sarah Frances holds an MBA with a concentration in marketing management from The Johns Hopkins University and a bachelor of science degree in international trade and finance from Louisiana State University.



Chris Voss

Founder and CEO
Black Swan Group

Chris Voss has used his many years of experience in international crisis and high-stakes negotiations to develop a unique program that applies globally proven techniques to the business world. Prior to 2008,

he was the lead international kidnapping negotiator for the FBI, as well as the FBI's hostage negotiation representative for the National Security Council's Hostage Working Group. During his government career, he also represented the U.S. government at two international conferences sponsored by the G-8 as an expert in kidnapping. He has also served as the lead crisis negotiator for the New York City division of the FBI. During Chris's 24-year tenure in the Bureau, he was trained in the art of negotiation by not only the FBI but Scotland Yard and Harvard Law School. He also is a recipient of the Attorney General's Award for Excellence in Law Enforcement and the FBI Agents Association Award for Distinguished and Exemplary Service.

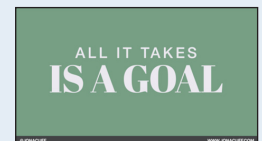
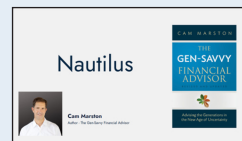


John Nersesian

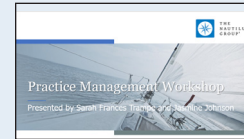
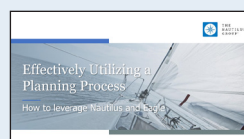
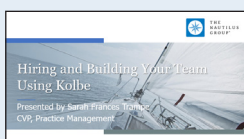
Head of Advisor Education
U.S. Global Wealth Management
PIMCO

Mr. Nersesian is head of advisor education at PIMCO, providing advanced wealth management and investment consulting education to financial professionals. Prior to joining

PIMCO in 2019, he was senior managing director of wealth management services for Nuveen Investments and a first vice president at Merrill Lynch Private Client Group, where he also led advanced training for financial consultants. He served as a board member of the Investments and Wealth Institute (IWI, formerly IMCA) from 2006–2017 and as chairman for the 2014–2015 term, and he is a faculty member for the IWI Certified Private Wealth Advisor and Certified Investment



Download copies of speakers' presentations and other handouts [here](#).



Nautilus Annual Meeting - Thursday, May 16th

MC: Gordon Parker

7 am - 5 pm	Check-in table open in Trinity foyer	Associates' Track breakfast in Pecos
7:30 am	Breakfast in Trinity I	Associates' Track participant breakfast By invitation only. Hosted by Jasmine Johnson <i>Grab your breakfast at the buffet and meet in Pecos.</i> 7:30 – 8:30 am
	Main platform presentations in Trinity River Ballroom	
8:30 am	"Coveted Client Experience: Grow Your Practice by Focusing on 3 Things Your Clients Truly Care About" Jay Baer 8:30 – 9:15 am	
9:15 am	Main platform presentation in Trinity River Ballroom "Positioning Product as Part of the Planning Process" - Panel discussion featuring Nautilus Members Jason Apolenis, Lizzie Dipp Metzger, Gordon Parker, and Gib Surles Hosted by Kathryn Rodgers, COO, The Nautilus Group 9:15 – 10:15 am	Associates' Track in Willow Creek (on 2nd floor) Associates' Panel Discussion featuring Kristin Beswick, Nicole Clemente, and Melissa Dyches Hosted by Jasmine Johnson Associate, Practice Management – Model Office 9:15 – 10:15 am in Willow Creek (on 2 nd floor)
10:15 am	Break	
10:45 am	Main platform presentation in Trinity River Ballroom "Deepening our Commitment to the Affluent Market" Mark Madgett, EVP & Head of Agency, Co-Head of Foundational Business, and Aaron Ball, SVP, Co-Head of Foundational Business Hosted by Mark Scozzafava 10:45 am – 12:00 pm	
12:00 pm	Lunch in Trinity I NYLARC Lunch in Copper Creek restaurant (located in Marriott lobby near hotel entrance) 12:00 – 1:30 pm	

Thursday speakers (In order of appearance)



Jay Baer
Business growth & customer experience strategist, researcher

Jay Baer is a customer experience and digital marketing pioneer, expert, advisor, researcher, and analyst. He has spent nearly 30 years helping the world's most iconic brands gain and keep more customers. A 7th-generation entrepreneur, Jay has written six best-selling books and founded five, multi-million dollar companies. Jay is an inductee into the halls of fame for professional

speaking and word of mouth marketing and is the creator of multiple award-winning podcasts. He is also one of just two people in the world listed as one of the Top 30 Global Gurus in two different knowledge categories: customer service and internet marketing. He founded the strategy and analysis firm Convince & Convert and is a board member of Experience Dynamic, a full-stack customer experience services collective. Media outlets like CNBC, NPR, Fox Business, and The Wall Street Journal frequently rely on Jay to comment and contextualize top trends. Jay loves growing businesses; delivering presentations that audiences love; and plaid suits. He's also a licensed tequila sommelier and a certified BBQ judge.

Thursday speakers *(continued)*



Jason Apolenis

Nautilus Plus Member Agent

Jason Apolenis is the Founder and Managing Principal at [Avenue Wealth](#). As a CFP® with more than two decades of highly-specialized experience, he provides comprehensive financial planning to executives, business

owners & other individuals with substantial income or assets in order to help them preserve and enhance their hard-earned wealth. Through an innovative coaching process, Jason helps his clients crystallize their goals and objectives and implement a plan to help accomplish them. Monitoring the plan and adjusting it over time as life evolves, Jason helps his clients to have financial peace and lead better, more rewarding lives.



Gib Surles

Nautilus Plus Member Agent

Gib is principal and founder of [The Forrest Group, L.L.C.](#), which was formed in 1995. With over 30 years of experience, he is passionate about the life insurance industry and the value with which it can bring to

families and business owners, ensuring that their legacies are passed on to future generations. Gib graduated from Texas A&M University in 1985 with a B.B.A in Marketing and quickly started his lifelong career with the New York Life Insurance Company. With an intense focus on always increasing his skillset and bringing a higher value to his clients, Gib upholds his dedication to continuing education. He received his MSFS in 2001. He was awarded the CLU® in 1996, ChFC® in 1997, CFP® in 1997, and AEP® in 1999.



Lizzie Dipp Metzger

Nautilus Plus Member Agent

2018 Council President

Lizzie's firsthand experience showed how disruptive business succession and estate planning can be; she saw the need for financial advisors to act as quarterbacks, truly overseeing the

big picture of a client's needs, not just the parts that they're directly involved in. She founded [Crown Wealth Strategies](#) to be that kind of firm, and she credits her comprehensive, client-centric approach with the fact that her business has grown into one of the most sought-after advisory practices in the nation.



Kathryn Rodgers

Corporate Vice President, COO
The Nautilus Group

Kathryn has been with Nautilus since 2007. As a member of the leadership team, she oversees the professional consultants and works with Nautilus Members to develop sophisticated

estate distribution and business planning presentations for high net worth clients. She also provides research on personal, estate, and business planning issues. Kathryn received her BS in accounting from Louisiana State University, her JD from St. Mary's University, and her LL.M. in taxation from Southern Methodist University. Prior to joining Nautilus, Kathryn worked as a manager at a local accounting firm where she assisted clients with various tax compliance issues.



Gordon Parker

Nautilus Member Agent

Gordon E. Parker, Jr. is Founder and Managing Partner of [Heritage Business Strategies](#). A lifelong resident of Coastal Virginia, Gordon's roots are in Suffolk. He grew up in a four-generation family business

that didn't survive to his generation. Good planning, bad planning, divergent technologies, and independent pieces of legislation, are a number of things that drove the family business out. He has spent the last 30 years working with business owners helping them make sure what happened to his family's business doesn't happen to them. "When I share my story with clients and advisers, they start to understand that I have an entrepreneurial background. I am a business owner and I understand what motivates business owners to take action."



Jasmine Johnson

Associate, Practice Management &
Model Office

Jasmine Johnson is an Associate on the Practice Management team with a focus on Nautilus members. Jasmine supports the Model Office program, where she assists Nautilus members

and their associates in developing back-office efficiency and strategic planning. Jasmine specializes in all things related to managing your practice such as staffing, business operations, client acquisition and more. Jasmine joined The Nautilus Group in 2022. The Dallas native earned her master of arts in journalism from the University of North Texas and her bachelor of arts in journalism at the University of Texas.

Thursday speakers *(continued)*



Mark J. Madgett

Executive Vice President & Head of Agency, Co-Head of the Foundational Business

Mark Madgett is executive vice president & co-head of the Foundational Business. He is specifically responsible for New York Life's career Agency

distribution system, which comprises more than 12,000 agents affiliated with 115 General Offices across the country, as well as many of the business units that provide strategy and support for the company's agents and field managers. He was appointed to NYL's Executive Management Committee in December 2015. Mark joined New York Life as an agent in 1986. Mark entered management in 1992 and became managing partner of the Seattle General Office in 1998. Under his leadership, the Seattle GO became one of the strongest agencies in the company and a perpetual leader in agent retention, among other areas. As a managing partner, he was widely acknowledged as a leader among his peers and was twice elected to serve as chair of the Managing Partners Advisory Council. He is a lifetime member of the Partner's Round Table. Mark joined the Home Office leadership team and was named senior vice president in September 2014. He assumed leadership of the Agency Department in January 2016. Mark also serves on the National Board of After-School All-Stars, which supports students in developing skills and habits needed to succeed in life, school, and future careers, and on the board of St. Mary's College in California, where he earned a degree in business. He and his wife, Lizanne, reside in New York and Seattle, and have two grown children, Sean and Meaghan.



Aaron Ball

Senior Vice President & Co-Head of the Foundational Business

Aaron Ball is senior vice president and co-head of New York Life's Foundational Business. He leads the retail product solutions, service, purchase experience, underwriting and marketing teams. He

joined New York Life in February 2015 as the Long-Term Care Solutions business leader and was appointed to New York Life's Executive Management Committee in September 2020. Prior to joining New York Life, Aaron served from 2003 to 2015 as senior vice president with Genworth Financial, where he led the company's long-term care in-force business and new product development efforts and provided legal and regulatory expertise as general counsel for several of the company's insurance businesses. From 2000 to 2003, he served as vice president and chief compliance officer of AmSouth Investment Services. Before joining AmSouth, he was senior vice president and chief legal officer for M&T Brokerage. Aaron earned a BA from Loyola College in Maryland and a JD from the University of Baltimore School of Law. He is a graduate of the executive leadership program at the University of Virginia Darden School of Business. In addition, he serves as a board member for LIMRA and LOMA, the Eluna Network, and LTC Reinsurance PCC. Aaron also also the executive sponsor of ENABLE, one of New York Life's Employee Resource Groups which helps raise awareness of and advocates for people with disabilities.

Thursday afternoon workshop speakers *(In alphabetical order)*

Nautilus Member Agents

Jason Apolenis - see page 9

Jesse Bond

Learn about Jesse at www.bondfinancial.biz

Michael Broderick

Learn about Michael at www.AtlanticPlanning.com

Pedram Kaivani

Learn about Pedram at www.kaivaniwealth.com

Michael Noland

Learn about Michael at www.integratedfinancial.net

Kirk Quaschnick

Learn about Kirk at www.triwealthllc.com

Taylor Sledge

Learn about Taylor at www.sledgecompany.com

Robin Wahby

Learn about Robin at www.wahbyfinancial.com

Nautilus Team Members

Come by the open offices from 4-5 pm on Thursday afternoon and meet the Nautilus staff on these teams:

Case Development

Kathryn Rodgers, manager

Robert Ahearn
Roger Arnwine
Randy Buchanan
Joon Cho
Scott Garrison
Michelle Kenyon
Matt Pate
Reed Snyder
Eva Stark
David Touns
Geoff Turvey
Chad Whitfield
and Allen Hensley (APG)

Marketing

Heather Davis, manager

Darla Bean
Megan (Hogan) Brewer
Maggie Riley

Practice Management

Erin Cook, manager

Jasmine Johnson
Julia McClung
Sarah Frances Trampe

Technology

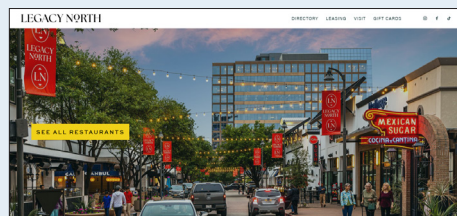
Rob Shapard, manager

David Ball
Daphna Freeman
Bill Micoff

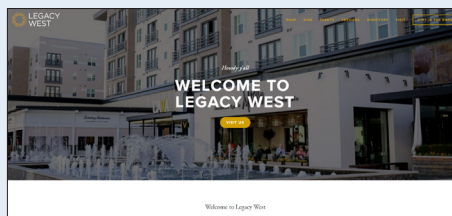
Thursday afternoon breakout workshops

	San Jacinto	Sabine (on 2nd floor)	Rio Grande (on 2nd floor)	Willow Creek (on 2nd floor)
1:30 pm	How to effectively create Nautilus & Eagle joint cases. Nautilus Members Jason Apolenis and Pedram Kaivani Hosted by Kathryn Rodgers 1:30 – 2:30 pm <i>(Session repeats at 2:45.)</i>	What's working now: Estate and business planning case studies. Nautilus Members Jesse Bond and Robin Wahby Hosted by Allen Hensley 1:30 – 2:30 pm <i>(Session repeats at 2:45.)</i>	How effective fact-finding paves the way to insurance positioning. Nautilus Members Kirk Quaschnick, Michael Broderick & Michael Noland Hosted by Matt Pate 1:30 – 2:30 pm <i>(Session repeats at 2:45.)</i>	Personality styles: Adjusting your approach based on how clients need to be heard. Nautilus Member Taylor Sledge Hosted by Erin Cook 1:30 – 2:30 pm <i>(Session repeats at 2:45.)</i>
2:30 pm	Break			
2:45 pm	<i>(Repeat of 1:30 session.)</i> How to effectively create Nautilus & Eagle joint cases. Nautilus Members Jason Apolenis and Pedram Kaivani Hosted by Kathryn Rodgers 2:45 – 3:45 pm	<i>(Repeat of 1:30 session.)</i> What's working now: Estate and business planning case studies. Nautilus Members Jesse Bond and Robin Wahby Hosted by Allen Hensley 2:45 – 3:45 pm	<i>(Repeat of 1:30 session.)</i> How effective fact-finding paves the way to insurance positioning. Nautilus Members Kirk Quaschnick, Michael Broderick & Michael Noland Hosted by Matt Pate 2:45 – 3:45 pm	<i>(Repeat of 1:30 session.)</i> Personality styles: Adjusting your approach based on how clients need to be heard. Nautilus Member Taylor Sledge Hosted by Erin Cook 2:45 – 3:45 pm
3:45 pm	Break			
4:00 pm	Open office: Case Development team Meet the staff and bring your questions. 4 – 5 pm	Open office: Technology team Meet the staff and bring your questions. 4 – 5 pm	Open office: Marketing team Meet the staff and bring your questions. 4 – 5 pm	Open office: Practice Management team Meet the staff and bring your questions. 4 – 5 pm
5:00 pm	Break			
5:30 pm	Reception in Trinity foyer 5:30 – 6:30 pm Nautilus Night Out 6:30 – 9:30 pm			

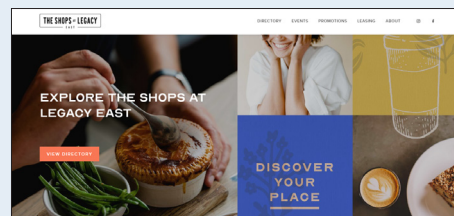
Nautilus Night Out: Where to explore?



[Legacy North](#)



[Legacy West](#)



[Legacy East](#)

Courtesy shuttles will run between the hotel and the Legacy West and Legacy North areas from 6:30 - 10:30 pm on Thursday.

Nautilus Night Out

Thursday, May 16th

Reception begins at 5:30 pm in Trinity foyer

If you chose to attend a hosted dinner,* meet your hosts in the Trinity foyer area at 6:15 to go to your selected restaurant. (Selected restaurants are indicated on your nametag.)

Look for the sign with your restaurant's name to locate your group.

All groups will depart the Marriott for their restaurants at 6:30 pm.

Del Frisco's
Grille

Host:
Heather Davis

Fleming's

Hosts:
Erin Cook and
Sarah Frances Trampe

Taverna

Hosts:
Michelle Kenyon
and Darla Bean

Bob's

Hosts:
Joon Cho and
Scott Garrison

Capital
Grille

Hosts:
Kathryn Rodgers and
Rob Shapard

Del Frisco's
Double Eagle
Steakhouse

Hosts:
Robert Ahearn,
David Ball, Matt Pate,
and David Touns

Truluck's

Host:
Mark Scozzafava

Courtesy shuttles will be provided for the evening.

Busses run on 15 to 20-minute loops until 10:30 pm, making the following stops:

- **From the Marriott hotel** (the bus stop is on the southwest corner of the Marriott building - from the hotel's front doors, follow the breezeway to Marinda Street and turn left); to
- **Del Frisco's Double Eagle Steakhouse** and **Taverna** restaurants (in the [Legacy West](#) area); to
- **Legacy Food Court** (in the [Legacy West](#) area); to
- **Circle drive near Mexican Sugar** restaurant (in the [Legacy North](#) area); to
- **The Capital Grille** restaurant (in the [Legacy North](#) area); and then return to the hotel.

* If you registered to attend a hosted dinner and do not show up at your assigned restaurant, the affiliated Nautilus Member or Home Office cost center will be charged a \$125 no-show fee. Your participation in this event is voluntary, not required or expected by New York Life, and it is not necessary to incur these expenses to perform your duties at New York Life. If you choose to participate, you authorize the related expenses that you are voluntarily incurring to be debited from your agent ledger, and you understand that such expenses will not be reimbursed, and such debits will be included in the calculation of your periodic compensation, as shown on your ledger.

Member agents who chose to have a night out on their own will receive a ledger credit for \$125 for themselves and each affiliated associate or team member choosing the same.

Nautilus Annual Meeting - Friday, May 17th

MC: Gib Surles

7 - 11:30 am	Check-in table open in Trinity foyer
7:30 - 9 am	Breakfast in Trinity I
7:30 am - 12:30 pm	Luggage storage (<i>All bags must be claimed by 12:30 pm.</i>) - If you're taking the bus to Love Field Airport, store your bags in Pecos. - If you're taking the bus to DFW Airport, store your bags in San Jacinto.
	Main platform presentations in Trinity River Ballroom
9:00 am	"The Gen-Savvy Financial Advisor" Cam Marston, Generational Insights
	9 – 9:45 am
9:45 am	"Life Stories: Meaningful Moments" Nautilus Members Gordon Parker, Tyson Vines, and Nelson Wood Hosted by Nautilus Member Gib Surles
	9:45 – 10:30 am
10:30 am	Break
11:00 am	"All it Takes is a Goal" Jon Acuff
	11 – 11:45 am
11:45 am	Closing remarks Mark Scozzafava 11:45 am – Noon
12:00 pm	Grab-n-go lunches available in Trinity foyer
12:30 pm	Buses depart for Love Field and DFW airports (outside the conference area doors).

Friday speakers *(In order of appearance)*



Cam Marston

Authority on generational differences & workplace trends

Cam Marston is the leading expert on the impact of generational change and how that affects the marketplace. He imparts a clear understanding of how generational demographics are

changing the landscape of business. Marston and his firm, Generational Insights, provide research and consultation on generational issues to hundreds of companies and professional groups, ranging from small businesses to multinational corporations, as well as major professional associations. He analyzes the major generations of our time: Matures (born before 1946); Baby Boomers (born 1946-64), Generation X (born 1965-79), and Millennials (born 1980-2000), and explains how their generational characteristics and differences affect every aspect of business, including recruiting and retention, management and motivation, and sales and marketing.

Gib Surles - see page 9

Gordon Parker - see page 9



Tyson Vines

Nautilus Member Agent

After a strong Wall Street career helping sovereign wealth funds, pensions and private banks globally, Tyson wanted to own a financial planning practice. He founded [V Financial Partners](#) in 2012 with the

mission to care for people and their businesses through personal finance and increase financial literacy in an enjoyable, open and honest way. Tyson's father passed away when he was in college. Caring for his widowed mother was the top priority. The moment they met a financial adviser, emotions calmed and comfort flowed with a sound financial plan of investments and insurance solutions. Tyson's lifelong career mission of Loving People Through Finance™ was born. Tyson believes everyone deserves an institutional Wall Street

Friday speakers *(continued)*

experience. Leaning on his global investment experience navigating the world’s largest investors through the Great Recession, V Financial Partners aims to deliver the same heightened experience to everyone.



Nelson Wood
Nautilus Member Agent

Nelson represents the 5th generation acting as principal and overseeing key strategic, marketing, and policy determinations for [Wood Legacy Group LLC](#). Currently, Nelson actively works with key client relationships

to add clarity to their objectives and align them with the necessary resources for accomplishing their goals with a focus on less risk, better asset protection and less tax. Nelson is a Dallas native, graduating from Cistercian Preparatory School and Texas A&M University with a Bachelor’s of Business Administration and Marketing. He also holds his Series 6 and 63 securities licenses. When not spending time with his wife Ali and three children – Kennedy, Hamilton, and Tennyson – he enjoys time with friends in the outdoors hunting and fishing.



Jon Acuff
Bestselling author, podcaster, & INC Top 100 speaker

Jon Acuff is the *New York Times* bestselling author of nine books, including “All it Takes is a Goal,” and “Finish.” Published in more than 20 languages, his work is both critically acclaimed and adored by readers. In “Soundtracks,” Jon demonstrates simple, surprisingly fun techniques you and your team could use to transform overthinking from a super problem into a superpower. He asks, what if you could take all those repetitive thoughts, which he calls soundtracks, and make them work for you, not against you, with a new mindset? When he’s not writing, Acuff can be found on a stage. Known for his insights wrapped in humor, Acuff shared the stage with an American Icon when he opened up for Dolly Parton at the Ryman Auditorium. For over 20 years he’s also helped some of the biggest brands tell their story, including The Home Depot, Bose, and Staples. His fresh perspective on life has given him the opportunity to write for *Reader’s Digest*, *Fast Company*, *The Harvard Business Review* and *Time Magazine*. Jon lives outside of Nashville, TN, with his wife, Jenny, and two teenage daughters.

Meeting attendee list *(Registered attendees and guests as of May 13)*

Nautilus Members:

Sean Andersen
Jason Apolenis
Nicolas Baker
Erick Barone
Michael Barry
Timothy Batanian
Bassem Beaini
Jesse Bond
Larry Botts
Tyler Breed
Michael Broderick
Tamara Burke
Daniel Chang
Tracy Chen
John Christopher
Jerry D Coats
Chad Courtois
Juliana Damopoulos
Kevin Davidson
Forrest DeBuys
Antonio DeLeon
Nathan Dempsey

Lizzie Dipp Metzger
Galen Dody
Frank Dolph
David Eddy
Isaiah Edison
Daryl Ellis
Nathan Engstrom
Barrett Ethington
Doug Famous
David Farra
Karin Feldstein
Matthew Ferris
Joel Field
Barry Finkelstein
Tim FitzGerald
Irv Flamer
Alison Flaum
Mike Flynn Jr
Everett Foxx
Paul Franklin
Evelin Freytas
Greg Genovese
Michael Gisonda

Dharmesh Goel
Diane Gould
Dan Gregory
Carrie Hall
Shaun Hamada
Paul Haye
Andrew Hill
Jeffrey Hudson
Michael Hutchinson
Vicente Iniguez
Dongzhe Jin
Blaine Johnson
Rodger Johnson
Emanuel Jones
Srikant Jonnada
Jennaydra Jordan
Pedram Kaivani
Robert Karalius
Tiffany Kirgan
Mark Kissinger
Jeffrey Knight
Joseph Kruse
Nathaniel Laupp

Meeting attendee list *continued*

Alejandro Leal
Terry Lewis
Darinka Lora-Stepan
Jerry Lorey
Tatiana Lott
Caleb Loud
Joel Magbitang
Bill Mahoney
Thomas Mathas
Sean McCann
Meghann Mckenna
Kimberly McKown Walters
Steven Meier
Corey Metz
Akiva Miller
Derek Moore
Kyle Mostransky
Gary Myers
John Nebeker
Anja Nickel
Michael Noland
Robert Ostberg
Gordon Parker
Silas Parker
Jaydev Patel
Richard Paulsen
Jeffrey Perryman
Adam Persky
Martin Petoyan
Tammy Plotkin-Oren
Aeramy Porter
Earl Prolman
Todd Purich
Kirk Quaschnick
Ted Ritchie
Mitch Rosenberg
Marc Rosenthal
Nadeem Salem
Capt Brett Sause
Gail Schank
Scott Schechter
Ben Schlafer
TOP Schofield
Zarir Sethna
Michael Shumard
Lenny Sklawer
Taylor Sledge

Insun Song
Brian Spader
Victoria Staudinger
Frank Sultonov
Tom Sunny
Gib Surles
Jerry Timmermann
Adam Tolliver
Tyson Vines
Joseph Vlock
Robin Wahby
Jessica Walker
Jing Wang
David Webb
Taylor White
Matthew Williams
Sam Winward
Mark Wiskus
Lynzie Wolters
Nelson Wood
Jeff Woods
Philip Wyatt
Nazih Yehya
Benjamin Yin
Wesley Young
Broderick Young

Nautilus Members' Successor Agents

Josh Batalden
Warren Bradley
Benjamin Brockman
Zachary Burke
Kristin Christofferson
Aaron Finkelstein
Jordan Godeaux
Paul Holman
Jacob Hopson
Jonathan Johnson
Aldric Johnson
Brian Keane
Edward Knight
Tyler Kruse
Jennifer Larsen
Ellis Lora-Arceo
Doreen Mahoney
Brian Metzger

Cleopatra Morales
Daniel Myers
Sachin Patel
Max Paulsen
Nolan Pendleton
Tyler Porter
Douglas Robbins
Bradley Ruh
Courtney Ruiz
Christopher Saras
Jack Stagg
Sam Strum
Sarina Tannehill
Charles Tucker
Mark Weller
Bradley Wessel
David Travis Wyatt

District Agent Program Participants

Joanna Antonopoulos
Shawn Chang
Dominick DiNofa
Daniel Dody
Ashley Ethridge
David Huffman
Matt Lemmond
Jason Palmadesso
Ryan Price
Joshua Salley
Jennifer Shibuya
Clinton Stosich
Dara Tompkison
Brandon Williams
Jennifer Williamson
Haoqiu Zhang

Nautilus Members' Guests

William Hays
Danny Li
Tia Pappas
Lucia Solis-Yera

Nautilus Group Guests

Wes Shelton
Dan Smith

Meeting attendee list *continued*

Nautilus Members' Associates

Ehab Abdalla
Cherry Albano
Nick Ardner
Abby Austin
Kathleen Bailey
April Baker
Kellie Bass
Vanessa Beechler
Kristin Beswick
Mari Bond
Rebecca Borton
Amber Bradley
Eve Brewer
Audrea Brunke
David Cardenas
Shelby Castro
Nicole Clemente
Lynne Coats
Cole Courtois
Creed Courtois
Andrea Crettol
Katarzyna Cruz
Gina Cueva
Kara Davidson
Kris Denson
Trinity Do
Erin Dobson
Trevor Dodd
Melissa Dyches
Rachel Elam
Sam Erickson
Mary Ernster
Micah Fannin
Jennifer Favors
Davis Fontenot
Jeff Gale
William Geasey
Kathy Gerdes
Rishinath Gipson
Cheryl Green
Joni Guidry
Kayla Hall
Dawson Halvorson
Mary Lynn Herrod
Brett Heuertz

Linda Heun
Steven Hicks
Dawn Holstein
Jennifer Jewell
Shelly Johnson
Leah Johnson
William Kilroy
Maddison Kinnee
Jeff Kissinger
Christine Kwiatkowski
Margaret LaBarr
Birdie LaGrande
Justin Lakin
Begona Lamas Parente
Julius Lambert
Matthew Leahey
Francesca Leonard
Alison Longstreet
Cameron Lorey
Lulu Lundstedt
Keith Lynch
Martha Mahoney
Seth McCarty
Stephanie McKinney
Cara McQuiston
Lisa Misuraca
Arin Moradian
Matthew Morales
Nicholas Netzer
Preston Neumann
Nina Oakley-Doran
Will Parker
Julie Paxton
Jessica Perry
Brandon Peterson
Jacob Phillips
Sonja Quaschnick
Sol Rascon
John Rehill
Suzannah Richards
Lisa Rios
Tyson Rivet
Isabel Schechter
Roswitha Schofield
Aron Scott
Anika Seiersen
Karen Shumard

JayAna Smith
Jodi Stephens
Celina Tardugno
Tobin Thomas
Jason Tobias
Taylor Triplett
Sonja Trujillo
Thomas Tyler
Victoria Valentin
Pamela Voss
Traci Wisard
Sean Woodside
Jamie Young

The Nautilus Group Staff

Robert Ahearn
Roger Arnwine
David Ball
Darla Bean
Megan (Hogan) Brewer
Randolph Buchanan
Joon Cho
Heather Davis
Tiffany Delaney
Ashley Ellis
Daphna Freeman
Jim Friendly
Cassie Garrett
Scott Garrison
Jasmine Johnson
Michelle Kenyon
Michelle Martinez
William Micoff
Robert Pate
Ashley Riley
Maggie Riley
Kathryn Rodgers
Mark Scozzafava
Robert Shapard
Arthur Snyder
Eva Stark
David Touns
Sarah Frances Trampe
Geoffrey Turvey
Chad Whitfield

Meeting attendee list *continued*

New York Life Home Office Guests:

Aaron Ball
John Boccio
Christopher Brown
Alise Civello
Ross Cohen
Nicholas Colello
Erin Cook
Thomas Dameron
Joy Davis
John DiCalogero
Thomas Gangemi
Andrew Goldstein
Reginald Harris
Dawn Head
Allen Hensley
Jeanmarie Holm
Nicola Iannitelli
Adam Kamm

Jeff Klein
Michael Lackey
Mark Madgett
Elizabeth McCarthy
Julia McClung
James McGregory
Karla O'Reilly
Brad Penny
Gerard Rocchi
Antonette Roig
Brian Seguin
Richard Simonetti
Andy Smith
Todd Taylor
Stephen Vinson
Sonali Virendra
David Wilcox
Julia Wysong

