



THE
NAUTILUS
GROUP®

2025 ANNUAL MEETING

14-16
MAY

Agenda & Event Guide

Marriott Town Center • Plano, TX



Mark Scozzafava

Welcome to the 2025 Nautilus Group Annual Meeting!

As usual, we are thrilled to present an engaging lineup of speakers and workshops designed to educate and motivate. And with our largest registration yet, we are confident you will also gain valuable insights from interactions with your peers during the breaks, dinners, and post-meeting conversations.

We strongly encourage you to take full advantage of your time here this week and all the opportunities for networking and learning – your presence is key to the success of this meeting. The incredible synergy and collaboration this group creates is always amazing and I'm so happy that you are here to be a part of it!

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When you arrive

Getting checked in

STEP 1

Get your nametag:

Check in and pick up your nametag, lanyard, and swag ticket at the main registration table.

STEP 2

Confirm your Night Out restaurant choice:

Make sure your lanyard matches your selected restaurant for the Nautilus Night Out. (see pg 13)

STEP 3

Use your swag ticket to choose your gifts:

Take your swag ticket to the Nautilus store located in the Red River room and choose your meeting swag! (see below)

Check-in table hours:

TUE - MAY 13

8:00 am - 5:00 pm

WED - MAY 14

7:00 am - 5:00 pm

THUR - MAY 15

7:00 am - 5:00 pm

FRI - MAY 16

7:00 am - 11:30 am

Choose your swag!

TIER I

choose

1

Large gift item
and 2 Tier III items.

TIER II

choose

2

Medium gift items
and 2 Tier III items.

TIER III

choose

3

Tier III gift items.

Nautilus swag store hours:

TUE - MAY 13

8:00 am - 5:00 pm

WED - MAY 14

7:00 am - 12:45 pm
5:00 - 6:30 pm

THUR - MAY 15

7:00 - 8:30 am

While supplies last. Swag items available for Nautilus members and associates only.

Pre-meeting sessions

Tuesday, May 13th

Nautilus Plus Members in San Jacinto		
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	Nautilus Board Members
5:30 pm	Reception for Nautilus Plus Members in Suite 221	Reception for Nautilus Board Members in Suite 221
6:30 pm	Nautilus Plus Members only dinner Hosted by Matt Pate	Nautilus Board Members dinner Hosted by Mark Scozzafava

Wednesday morning, May 14th

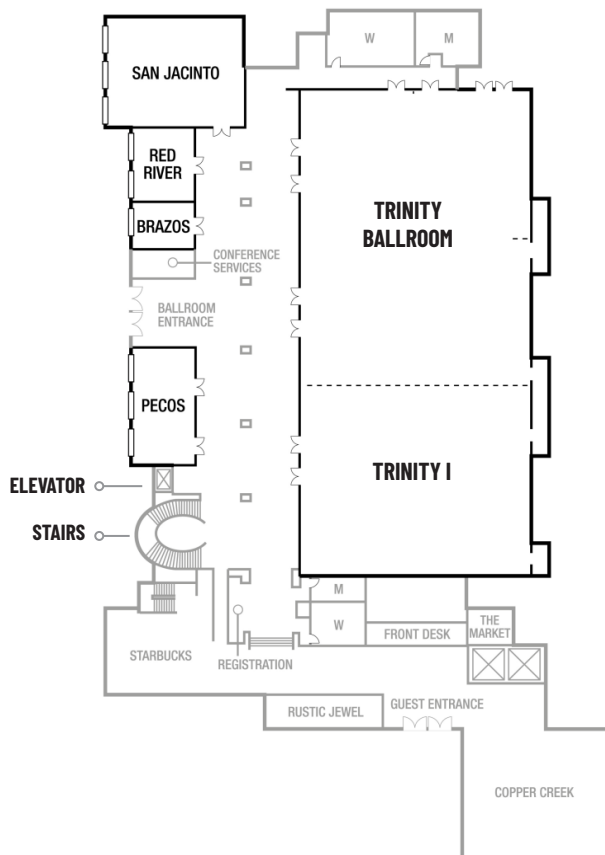
7:30 – 8:30 am Breakfast in Trinity I

	Nautilus Plus Members Only in San Jacinto on Level I	Nautilus Coaching Series in Sabine on Level II	Practice Management in Willow Creek on Level II	Nautilus Board Members in Canyon Lake on Level II	Nautilus Case Development in San Antonio on Level II
7:30 am	Nautilus Plus Members only breakfast				
8:00 am				Nautilus Board meeting	
8:30 am	Idea Sharing for Nautilus Plus Members only	Coaching Series <i>By invitation only</i> Allen Hensley	Succession Planning overview Sophia Rodriguez		
9:00 am	Hosted by Matt Pate		Practice Management: Key Strategies for Growth, Efficiency, and Client Satisfaction with Sarah Frances Trampe, Julia McClung, and Darla Bean		Nautilus case development team
9:30 am					Open office hours
11:30 am					
12:00 pm	Lunch for Nautilus Plus Members only outside San Jacinto				
	New Member Lunch with Nautilus board, Next Gen committee, and Nautilus leadership team <i>By invitation only. Grab your lunch from the buffet and meet in Pecos.</i>				

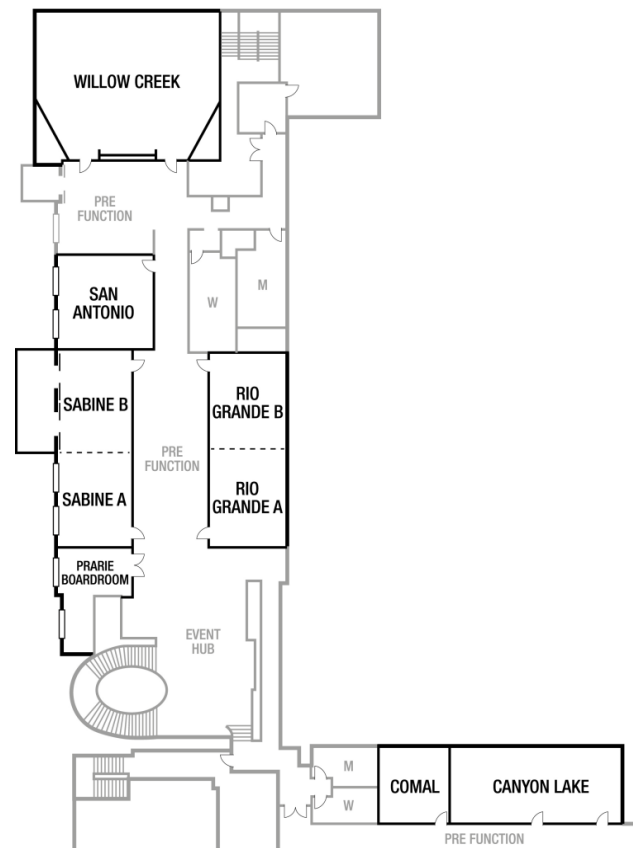
Lunch in Trinity I for all attendees.

Conference center Map

LEVEL 1 MEETING SPACE



LEVEL 2 MEETING SPACE



Wi Fi password:

NAM2025!



Scan the QR code or click [here](#) to view & download slide presentations and access additional meeting resources.

Annual Meeting agenda

Wednesday afternoon, May 14

Emcee: Nautilus Plus Member Gib Surles

Main platform presentations in Trinity Ballroom	
1:00 pm	Opening remarks Mark Scozzafava , VP, Field Productivity Value Stream CEO, The Nautilus Group
1:30 pm	Rules for Amazement Jon Petz
2:30 pm	Break
Main platform presentations in Trinity Ballroom	
3:00 pm	Economic Outlook Marci Rossell
4:00 pm	Creating Content that Connects: A New Model for a Modern Financial Services Professional Ann Handley
5:00 pm	Break
5:45 – 6:45 pm	Associates' Happy Hour in Suite 221 on Level II

Nautilus Night In

**6:00 to
9:00 pm**

RECEPTION

Begins at 6 pm in
the Trinity lobby area

DINNER

Served at 6:30 pm in Trinity I

ENTERTAINMENT

You are the star of the night!
Show off your musical chops
in Trinity I with the backing
of a live band, and get your
portrait drawn in the
Trinity lobby.

Texas Live Karaoke



[See the song list and pick your favorites!](#)

Digital caricature portraits



[See the gallery from BenJamN Vincent & crew.](#)

Featured speakers

Keynote presenters



JON PETZ

Wednesday @ 1:30 pm

Rules for Amazement

Jon is a former sales & marketing executive who uses his work as a professional magician to deliver a unique message that blends strategy, mindset, inspiration, and entertainment. Jon's quest to help people engage, perform, and fuel success has been featured by top media outlets such as *USA Today* and the *Wall Street Journal*. [Read full bio.](#)



MARCI ROSSELL

Wednesday @ 3:00 pm

Economic Outlook

A renowned economist, financial expert and former CNBC Chief Economist, Marci is known for making complex economic issues accessible and engaging. With a Ph.D. in economics and experience at OppenheimerFunds and the Federal Reserve, she provides a dynamic perspective on economic disruption and the future of accountable capitalism. [Read full bio.](#)



ANN HANDLEY

Wednesday @ 4:00 pm

Creating Content that Connects

Ann is Chief Content Officer at MarketingProfs and one of the seven top influencers shaping modern marketing according to IBM, with a social media following of more than 420,000. Ann lives in Boston, where she also is a mom, a tap dancer, and a vintage typewriter collector. [Read full bio.](#)



RYAN ESTIS

Thursday @ 8:30 am

The Art of Standing Out

Recognized for helping individuals and organizations achieve sustainable success, Ryan is known for inspiring growth and transformation. His passion for helping people reach their highest potential shines through his groundbreaking insights on sales, leadership, and communication as he inspires and equips his audience with tools to empower their teams and adapt to today's dynamic marketplace. [Read full bio.](#)

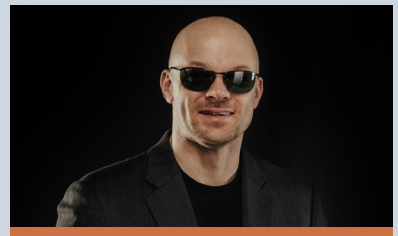


RIAZ MEGHJI

Friday @ 10:00 am

Every Conversation Counts: Building Extraordinary Relationships

Dedicated to exploring ways that the authentic human connection can change lives and organizations, Riaz is a former TV host with 17 years of experience interviewing leaders across politics, business, and entertainment. He is a dynamic storyteller, passionate about life-changing conversations and giving back to the community. [Read full bio.](#)



CHAD FOSTER

Friday @ 11:00 am

How to go from Victim to Visionary

The first blind person to graduate from Harvard Business School's leadership program, Chad has created software and millions of jobs for the visually impaired. His story has inspired audiences globally as well as an opera house commissioning a performance based on his life. Chad's journey demonstrates how to overcome life's blind spots. [Read full bio.](#)

Executive panel

Thursday @ 9:30 am



Aaron BALL

Executive Vice President, Head of the Foundational Business

Aaron leads NYL's retail product solutions, service, purchase experience, underwriting and marketing teams. He joined New York Life in 2015 as the LTC Solutions business leader and was appointed to New York Life's Executive Management Committee in 2020.

Prior to joining New York Life, Aaron led Genworth Financial's LTC 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. He also served as VP and chief compliance officer for AmSouth Investment Services and as SVP 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 is 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.



Sonali VIRENDRA

Senior Vice President, Head of Agency

Sonali oversees the company's career Agency distribution system, leading a network of more than 12,000 agents and advisors across more than 110 GOs nationwide, in addition to managing the business units that provide strategic support to the field. She was appointed to New York Life's Executive Management Committee in January 2025.

Sonali began her career with New York Life in 1997 as a Development Manager in the New Jersey GO and progressed through various leadership roles, including Life Product Consultant, National Life Sales Officer, and head of the West Central Zone. Her contributions have been critical in advancing sales strategies, agent development, and digital transformation initiatives.

Raised in Hong Kong, Sonali holds a bachelor's degree in political science from Mount Holyoke College and an MBA from Sacred Heart University. She has earned designations such as Chartered Life Underwriter and Chartered Financial Consultant.

Annual Meeting agenda

Thursday morning, May 15

Emcee: Nautilus Plus Member Jason Apolenis

7:30 am	Breakfast in Trinity I for all attendees.	
	Main platform presentations in Trinity Ballroom	
8:30 am	The Art of Standing Out Ryan Estis	
9:30 am	Home Office Executive Panel discussion with Aaron Ball, EVP, Head of Foundational Business and Sonali Virendra, SVP, Head of Agency Hosted by Nautilus Plus Member Michael Broderick, CAP®, CFP®, ChFC®, CLU®, RICP®	
10:30 am	Break	
	Main platform presentations in Trinity Ballroom	Associates' Track in Willow Creek on Level II
11:00 am	Capital Equivalent Value: Calculating the Lifetime Benefits of Whole Life Nautilus Plus Member Joe Kruse, CLU®, ChFC®, CFP®, AEP® and Advanced Sales Officer Allen Hensley, CLU®, ChFC®, MSFS, AEP®	The <i>Intentional</i> Advisory Practice Linda Eaton, Canon Financial Institute
12 – 1:00 pm	Lunch in Trinity I for all attendees.	
	Associates' Lunch - <i>Grab your meal from the buffet and meet in the Pecos room on Level II.</i>	
	NYLARC Lunch in Copper Creek restaurant (<i>located in Marriott lobby near hotel entrance</i>).	

Associates' track

Canon Financial Institute

The *Intentional* Advisory Practice

11:00 am - 12:00 pm in Willow Creek on Level II

- A look at behavioral finance, how clients make financial decisions and the impact of how they feel.
- You are the first line, the touchpoint for the client experience.
- Absolutes - the bedrock of client experience.
- Brainstorming breakouts.



Linda EATON

The *Efficient* Advisory Practice

1:30 - 2:30 pm in Sabine on Level II

- Real-world time management for the administrative professional.
- Partnering for productivity.
- Characteristics of effective teams.

The *Effective* Advisory Practice

2:45 - 3:45 pm in Sabine on Level II

- The importance of questions.
- Dealing with client concerns.
- Listening skills.
- Action planning.

Nautilus Member presenters

Peer best practices & case studies



Joe KRUSE

Capital Equivalent Value: Calculating the Lifetime Benefits of Whole Life

2023 Council President and Nautilus Plus Member Joe Kruse will be joined by Allen Hensley, Advanced Agent Development Officer

Thursday @ 11:00 am
in Trinity Ballroom *on Level I*



Xin WANG and Mike FLYNN

Incorporating Life Insurance into Your Financial Planning Process

2024 Council President and Nautilus Plus Member Xin Wang will be joined by Nautilus Member Mike Flynn in this repeating discussion moderated by Kathryn Rodgers.

Thursday @ 1:30 pm
repeats @ 2:45 pm
in Willow Creek *on Level II*



Michael NOLAND

Business Succession Case Study Selling to a Third Party

Nautilus Member Michael Noland will be joined by SM2's certified M&A advisor Wes Shelton to present a business market case study.

Thursday @ 2:45 pm
in Trinity Ballroom *on Level I*

Annual Meeting agenda

Thursday afternoon breakouts

	San Jacinto on Level I	Willow Creek on Level II	Trinity Ballroom on Level I	Sabine on Level II
1:30 pm	Human Centered Leadership Ryan Estis Ryan leads an Interactive experience that prepares you to lead agile, collaborative, and digitally enabled teams. (Repeating workshop)	Incorporating Life Insurance into Your Financial Planning Process 2024 Council President and Nautilus Plus Member Xin Wang with Nautilus Member Mike Flynn Jr. (Repeating workshop)	Business Market: Maximizing Business Value – Discussion with David Adams, Adams Capital; Sean Hutchinson, Ready for Next; and Wes Shelton, SM2 Advisors, led by VP Kathryn Rodgers, Nautilus COO.	Associates Track: The Efficient Advisory Practice Linda Eaton, Canon Financial Institute
2:30 pm	Break			
2:45 pm	Human Centered Leadership Ryan Estis Repeat session of previous workshop.	Incorporating Life Insurance into Your Financial Planning Process Repeat session of previous workshop.	Business Market: Business Succession Case Study - Sale to 3rd Party Nautilus Member Michael Noland and Wes Shelton, SM2 Advisors	Associates Track: The Effective Advisory Practice Linda Eaton, Canon Financial Institute
3:45 pm	Break			
4:00 pm	Open office: Marketing team Meet the staff and bring your questions.	Open office: Technology team Meet the staff and bring your questions.	Open office: Case Development team Meet the staff and bring your questions.	Open office: Practice Management team Meet the staff and bring your questions.
5:00 pm	Break			

Nautilus Night Out

5:30 pm **RECEPTION**

6:30 pm **DEPART FOR DINNER**

Gather in the Trinity lobby area near the Nautilus staff members holding the signs with the name of your selected restaurant. Those attending Del Frisco's Double Eagle Steakhouse will follow their Nautilus hosts to meet the bus going to the restaurant. All other groups will walk to selected restaurants. Please let an event team member know if you need assistance.

DEL FRISCO'S GRILLE	DEL FRISCO'S DOUBLE EAGLE STEAKHOUSE	CAPITAL GRILLE	BOB'S	TRULUCK'S	FLEMING'S
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Your nametag lanyard color indicates your restaurant selection.

Annual Meeting agenda

Friday morning, May 16

Emcee: Nautilus Board Member Kirk Quaschnick

7:30 – 8:45 am Breakfast in Trinity I

Main platform presentations in Trinity Ballroom

9:00 am **Business Succession Planning Challenges in 2025**
Steve Siegel, JD, LL.M.

10:00 am **Every Conversation Counts: Building Extraordinary Relationships**
Riaz Meghji

10:45 am Break

11:05 am **Blind Ambition: How to go from Victim to Visionary**
Chad Foster

11:50 am **Closing remarks**
Mark Scozzafava

12:00 pm Grab-n-go lunches will be available in Trinity foyer.

Transportation to airport

Complimentary buses to both DFW and Love Field airports will be provided on Friday. Buses will leave the Marriott promptly at 12:30 pm. For other arrangements, inquire at the Marriott valet stand.

Luggage storage

Staffed luggage storage rooms are available on Friday morning. Store bags in San Jacinto for the DFW bus and in Pecos for the Love Field bus; all bags must be claimed by 12:30 pm.

Speaker profile

Technical presentation



Steven G. Siegel JD, LL.M.

Friday @ 9:00 am

Business Succession Planning Challenges in 2025

Steven is president of The Siegel Group, which provides consulting services to attorneys, accountants, business owners, family offices, and financial planners throughout the United States. He presently serves as an adjunct professor of law in the graduate tax program (LLM) of the University of Alabama School of Law and is a prolific author and lecturer. Steven holds a bachelor's degree from Georgetown University (magna cum laude, Phi Beta Kappa); a juris doctor from Harvard Law School; and an LLM in taxation from New York University Law School.

F.A.Q. at the Nautilus Annual Meeting

1. Can I change my restaurant for the Nautilus Night Out?

Yes! You can swap seats with each other, using your lanyard as the ticket:

	Orange lanyard with white logo - DEL FRISCO'S GRILLE
	Navy blue lanyard with white logo - DEL FRISCO'S DOUBLE EAGLE STEAKHOUSE
	Gray lanyard with black logo - CAPITAL GRILLE
	Black lanyard with white logo - BOB'S
	White lanyard with blue logo - TRULUCK'S
	Royal blue lanyard with white logo - FLEMING'S

2. Can I talk to a Nautilus case consultant about my case?

Yes.

Nautilus Case Consultants will be available to discuss cases during two open office sessions:

TUE - MAY 13

9:00 - 11:30 am
in San Antonio
(on Level II)

THUR - MAY 15

4:00 - 5:00 pm
in San Jacinto
(on Level I)

3. Where can I charge my phone / tablet / laptop?

Answer:

The Nautilus IT team has a supply of portable battery chargers available for your personal use. Go to the Red River room (on Level I) to check out a charger. The charger station is open:

WED - MAY 14

7:00 am - 12:45 pm
5:00 - 6:30 pm

THUR - MAY 15

7:00 am - 5:30 pm

FRI - MAY 16

7:30 - 11:45 am

Meeting attendees will be responsible for any chargers not signed back in before 11:45 am on Friday.

Meeting Attendees

Nautilus Plus Members

Jason Apolenis
Armondo Brennan
Michael Broderick
Lizzie Dipp Metzger
Alison Flaum
Paul Franklin
Carrie Hall
Julia Hsiao
Ryan Jin
Rodger Johnson
Joe Kruse
Bill Mahoney
Sean McCann
Jay Patel
Rick Paulsen
Taylor Sledge
Gib Surles
Xin Wang
Nazih Yehya
Joyce Yoo
Wes Young

Nautilus Members

Nic Baker
Erick Barone
Mike Barry
Tim Batanian
Trish Bauman
Bassem Beaini
Jesse Bond
Larry Botts
Tyler Breed
Andrea Burckhard
Tamara Burke
Daniel Capurso
Daniel Chang
Tracy Chen
Jerry Coats
Bruce J Cumby
Juli Damopoulos
Kevin Davidson

Forrest DeBuys
Tony DeLeon
PJ Demarie
Nathan Dempsey
Galen Dody
Frank Dolph
Isaiah Edison
Elaine Eisner
Daryl Ellis
Nathan Engstrom
Curt Eskew
Barrett Ethington
Doug Famous
Karin Feldstein
Terry Fenwick
Matt Ferris
Joel Field
Barry Finkelstein
Irv Flamer
Mike Flynn Jr.
Everett Foxx
Evelin Freytas
Michael Gisonda
Diane Gould
Dan Gregory
Shaun Hamada
Hunter Hartman
Paul Haye
Thomas Herrod
Nick Hjorth
Jeff Hudson
Rebecca Hunter
Michael Hutchinson
Vinnie Iniguez
Moishe Jaroslawitz
Sri Jonnada
Pedram Kaivani
Rob Karalius
Tiffany Kirgan
Mark Kissinger
Nathan Laupp
Alejandro Leal
Caleb Loud

Joel Magbitang
Tom Mathas
Meghann McKenna
Andrew McReynolds
Steven Meier
Corey Metz
Akiva Miller
Derek Moore
Kyle Mostransky
Gary Myers
John Nebeker
Michael Noland
Rob Ostberg
Nick Parikh
Silas Parker
Gordon Parker
Al Patel
Richard Patterson
Adam Persky
Martin Petoyan
Tammy Plotkin-Oren
Aeramy Porter
Hillary Price
Earl Prolman
Todd Purich
Kirk Quaschnick
Ted Ritchie
Nick Rogers
Mitch Rosenberg
Marc Rosenthal
Zachary Ruttenberg
Nadeem Salem
Gail Schank
Ben Schlafer
Zarir Sethna
Ron Shirey
Mike Shumard
Lenny Sklawer
Ryan Southwick
Vicky Staudinger
Frank Sultonov
Tom Sunny
Jerry Timmermann

Meeting attendee list *continued*

Kris Vanesko
Steve Vanesko
Tyson Vines
Scott Vitebskiy
Robin Wahby
Jessica Walker
Jing Wang
David Webb
Matt Williams
Sam Winward
Mark Wiskus
Nelson Wood
Troy Woods
Travis Wyatt
Wei Xue
Broderick Young

Nautilus Members' Successor Agents

Chris Armistead
Kaelyn Armistead
Grant Burckhard
Zach Burke
Kristin Christofferson
John Dolph
Aaron Finkelstein
Jordan Godeaux
Jimmy Hagge
Paul Holman
Al Johnson
Jonathan Johnson
Brian Keane
Rick Kelly
Tyler Kruse
Jennifer Larsen
Cleo Morales
Dan Myers
Derek Nease
Sachin Patel
Max Paulsen
Cameron Reeves
Andrew Reid

Bradley Ruh
TOP Schofield
Sam Strum
Chad Tucker
Rena Wang
Mark Weller
Adam Wheeler

Children of Nautilus Member agents

Brett Heuertz
Carrick M. McCann
Will Parker
Zal Sethna
Malek Yehya

Agents affiliated with Nautilus Member's dba

Jennifer Argabright
Erik Baldwin
Ish Boghossian
Shelby Castro
Shawn Chang
John Collett
Kristin Daniel
Robert Davanzo
Alejandro Delfino
Bianca DiFranco
Mary Ernster
Henry Frazier
Ryan Gill
Luka Huang
Carol Jones
AJ Landrum
Matt Lemmond
Danny Li
Christian Lozano
Rory McNabb
Brian Metzger
Mike Miller
Raeleen Molina
Arin Moradian

Vincent Nestorovski
Nicholas Netzer
Jason Palmadesso
Benjamin Pettit
Cole Pizzi
Tyler Porter
Suzannah Richards
Douglas Robbins
Vishal Sharma
Jennifer Shibuya
Randall Smith
Lucia Solis-Yera
Zach Starostka
Clinton Stosich
Ailene Tanaka
Charlotte Tong
Reed Trautman
Taylor Triplett
David Tucker
Tom Tyler
Reinaldo Wahnon
Brandon Williams
Jennifer Williamson
Kevin Wong
Tyler Young

District Agent program participants

Jeff Bradford
Jenny Castro
Michael Hennessy
Tia Pappas
Leona Zhang

Nautilus guests

Joe Garrel
Mauricio Gaitan
Taylor Loe
Gail Davis
Kerris Willett
Jazmin Garcia
Trish Halligan

Meeting attendee list *continued*

Guest speakers

David Adams, Adams Capital
Linda Eaton, Canon Financial
Institute
Sean Hutchinson, Ready For
Next
Wes Shelton, SM2 Advisors

Nautilus Members' Associates

Cherry Albano
Samantha Albarado
Carol Amaya
Salina An
Nick Ardner
Kathleen Bailey
Kellie Bass
Mari Bond
Elvia Brennan
Alexander Brese
Eve Brewer
Peter Campagna
David Cardenas
Will Carlson
Jayden Carpenter
Sandra Carrillo
Callie Catherwood
Charlene CHEN
Nicole Clemente
Lynne Coats
Adunni Covington
Andrea Crettol
Stephanie Darnielle
Kara Davidson
Trinity Do
Erin Dobson
Trevor Dodd
Tori Doescher
Annamarie Donnadio
Haley Dunlea
Rachel Elam
Jennifer Favors

Jordan Forrest
Kim Francesangelo
Trevor Fridell
Andrew Gale
Jeff Gale
Bill Geasey
Kathy Gerdes
Deena Giovannelli
Rishi Gipson
Mary Gong
Michelle Gord
Audrey Greely
Cheryl Green
Dawson Halvorson
Ruth Haye
Steven Hicks
Dawn Holstein
David Huffman
Samantha Rae Hughes
Jill Jaquess
Jennifer Jewell
Leah Johnson
Andrew Kasiski
Colston Kemp
William Kilroy
Maddison Kinnee
Jennifer Kissinger
SUSAN KNAPIK
Christine Kwiatkowski
Maisie LaBarr
Justin Lakin
Brianna Lam
Gavin Landry
Matthew Leahey
Jennifer Lee
Francesca Leonard
Daniel Lopez
Lulu Lundstedt
Keith Lynch
Pablo Magdaleno Carlos
Doreen Mahoney
Martha Mahoney

Kelly McBride
Jennifer McClintock
Stephanie McKinney
Cara McQuiston
Abigail Meade
Lisa Misuraca
Emil Musgrove
Samit Patel
Julie Paxton
Kim Permann
Carter Pettey
Jacob Phillips
Ella Plotkin-Oren
Sonja Quaschnick
Adrienne Quintero
Sol Rascon
Jake Roorda
Shyla Sato
Nancy Sault
Aron Scott
Anika Seiersen
Karen Shumard
Catherine Sledge
Elizabeth Steiner
Jodi Stephens
Daniel Sullivan
Tobin Thomas
Jason Tobias
Ana Triplett
Sonja Trujillo
David Tucker
Victoria Valentin
Pamela Voss
Wei Wei
Lauren Wells
Traci Wisard
Jayne Yoo
Jamie Young
Paris Zhang
Cindy Zhang
Bingjie Zhu

Meeting attendee list *continued*

The Nautilus Group staff

Ife Adesola
Robert Ahearn
David Ball
Darla Bean
Randy Buchanan
Joon Cho
Tiffany Delaney
Ashley Ellis
Daphna Freeman
Jim Friendly
Cassie Garrett
Scott Garrison
Jasmine Johnson
Michelle Kenyon
Michelle Martinez
Bill Micoff
Jamie Moore
Ashley Nolan Riley
Matt Pate
Maggie Riley
Kathryn Rodgers
Mark Scozzafava
Rob Shapard
Arthur Reed Snyder Jr.
Yvonne St. John
Eva Stark
Sarah Frances Trampe
Geoff Turvey

Nautilus Annual Meeting event staff

Adam Kamm
Brian Jones
Cory Williams
Jennifer Hausheer
Laura St. Pierre
Thomas Dameron

New York Life Home Office & Agency representatives

Stephanie Bagwell
Aaron Ball
Christopher Brown
Hunter Bulk
Ramon Casanova
Nick Colello
Joy Davis
John DiCalogero
Tom Gangemi
Andrew Goldstein
Emily Gonce
Mariela Gonzalez
JD Harness
Reginald Harris
Dawn Head
Allen Hensley
Elizabeth Hill

Jeanmarie Holm
Dylan Huang
Michael Lackey
Jason Leonard
Sean Madgett
Antoinette Marshall
Michelle Martin
Julia McClung
Mark McGregory
Scott McNulty
Mychael Nguyen
Karla O'Reilly
Brad Penny
DJ Phan
DeDe Pochos
Alexis Quaglieri
Gerard Rocchi
Sophia Rodriguez
Antonette Roig
Brian Seguin
Rich Simonetti
Andrew Smith
Stephen Vinson
Sonali Virendra
Greg Webster
Eddy Wong
Julia Wysong
Frederick Yates

Thank you for attending the 2025 Nautilus Annual Meeting. Please take this event survey and share your feedback.



Save the dates for 2026: May 12-15



THE
NAUTILUS
GROUP®

Thank you for attending!

The Nautilus Group®
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