

FIELD NOTES

WHAT IF?

2024 FALL FINANCIAL ADVISER CONFERENCE
— SEPTEMBER 18 -20, 2024 —



CFD COMPANIES



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OUR MISSION

cfid Investments is a Broker/Dealer dedicated to providing Financial Advisers with the necessary support, tools, techniques, quality financial products, and technologies for the achievement of their clients' goals and objectives through a team of home office personnel committed to serving advisers in a Christ-like manner, believing you cannot push someone to the top of the mountain without getting there yourself.



WELCOME

Dear Valued Financial Advisers:

You are VALUED and this conference is designed with you in mind! We believe that we have put together a great agenda! The goal always being that you take something back with you that provides value to your business and improves how you serve your clients. The theme this year is "What If?" Throughout 2024, we have asked this question many times in our Department Head and Strategy & Ops Meetings. What if we could do this for our advisers? What if we could provide this service for our advisers? What if, what if, what if!?!? I believe in doing this, it has sharpened our firm's ability to serve you at a higher level.

You will hear from several of our Presidential Advisers! Breakouts and individual sessions will include Dan Ballister, Mike Dusold, Ben Franklin, Dan Hoelscher, Alex Lebron, and Chris Rocky! We hope that by hearing from some of the firm's Top Financial Advisers, it will inspire you and plant seeds to help you take your business to the next level! Presentations will be given by Home Office Executives that include: Matthew Bahrenburg, Zach Covert, Gerry Good, and Gregg Rooze. These breakout sessions are a must see! Finally, we are bringing in FIVE keynote speakers! Ramon Ray, Michael Alford from the FBI, Mike Rayburn – What If?, Dale Brown from FSI, and Charles Payne from Fox Business Network are all dynamic speakers and will bring great value to this year's conference!

Over the years, the Fall Financial Adviser Conference has become a Family Reunion! We love when we gather as a group! We look forward to the fellowship that we are going to have with you over the next three days! We hope that you dive into the conference experience! "WHAT IF" this is the BEST Conference you have ever attended? That is our hope! Be Blessed everyone and have a great conference experience!

BTW, my wife says that I use exclamation marks instead of periods too much, but you know what? What if, I am just that excited about this year's conference!?!?!!!!!













Sincerely,








Brent Owens

WEDNESDAY

SEPTEMBER 18, 2024

TIME	LOCATION	EVENT
12:00PM - 1:00PM	Café	BOXED LUNCHES FOR THOSE WHO REGISTERED FOR THE MEAL
1:00PM - 1:40PM	Auditorium	SUPER ADVISER PANEL, KREGG ROOZE
    		
KREGG ROOZE ALEX LEBRON CHRIS ROCKEY DAN BALLISTER DAN HOELSCHER		
1:40PM - 3:00PM	Auditorium	HOME OFFICE SPEAKERS
   		
1:40 - BUYING OR SELLING A FINANCIAL SERVICES PRACTICE, MATTHEW BAHRENBURG		
2:20 - GROW WITH US, ZACH COVERT		
2:40 - THE FUTURE OF COMMISSIONS DASHBOARD, GERRY GOOD & GREG SMITH		
3:00PM - 4:00PM	Auditorium	ADVISER SPEAKERS
 		
3:00 - THE TAX TRIANGLE OF INVESTING, DAN BALLISTER		
3:30 - BRIAN'S STORY: EVERY ADVISER ON THE SUD FRONTLINE, MIKE DUSOLD		
4:00PM - 5:00PM	Auditorium	KEYNOTE SPEAKER, RAMON RAY
		
<p>Ramon Ray is an entrepreneur, author, and speaker who loves burnt pancakes, bacon, and eggs. He is the founder of Smart Hustle Media and has started four companies and sold two. Ramon has authored four books and his latest book is "Celebrity CEO - How Entrepreneurs Can Thrive By Building a Strong Personal Brand".</p>		
5:30PM - 7:30PM	Gymnasium	PRAYER DINNER AT CREATIVE FINANCIAL CENTRE® SPONSORED BY TIMOTHY FUNDS

TIME	LOCATION	EVENT
7:30AM - 8:30AM	Café	BREAKFAST WITH THE CORPORATE SPONSORS
8:30AM - 9:30AM	Auditorium	CYBER THREATS, MICHAEL ALFORD ADDRESSING THE LATEST CYBER ATTACKS TARGETING THE UNITED STATES  <p>Michael Alford has been a Special Agent with the FBI for over 16 years, and he is the Acting Supervisory Special Agent of the FBI's Cyber Program in Indianapolis. He has a Master's of Science in Digital Forensics from the University of Central Florida, and he has over 25 years of experience in computer security and computer forensics. Michael is a member of the FBI's elite Cyber Action Team, known as CAT, a group which brings in-depth cyber intrusion expertise and specialized investigative skills to FBI initiatives, investigations, and emergencies deemed critical and significant. He has participated in numerous CAT deployments to critical infrastructure sectors including Water, Oil, & Natural Gas Energy, Elections Infrastructure, Defense Industrial Base, and Government Facilities.</p>
9:30AM - 10:00AM	Auditorium	TEAM CFD MEETINGS
10:00AM - 11:00AM	Auditorium	LOOK AHEAD TO 2025, BRENT OWENS 
11:00AM - 12:00PM	Auditorium	KEYNOTE SPEAKER, MIKE RAYBURN  <p>Mike Rayburn is a Hall of Fame Speaker and two-time TED Talk Presenter who inspires a new mindset and real solutions for organizations who want to elevate, innovate, and transform. Rayburn's solutions are bold, effective, and proven. The true inspiration, though lies in the experience Rayburn creates. He uses world-class guitar (Carnegie Hall headliner) and humor (Las Vegas headliner) to create a transformational program unlike any in the world.</p>
12:00PM - 1:30PM	Café	LUNCH WITH THE CORPORATE SPONSORS
1:30PM - 3:15PM	Auditorium	PLATINUM & GOLD SPONSOR TALKS
3:15PM - 5:15PM	Auditorium	COMPLIANCE MEETING, MATTHEW BAHRENBURG 
6:00PM - 7:30PM	Legacy Barn	DINNER 951 COUNTY ROAD NORTH 600 W, KOKOMO, IN 46901

TIME	LOCATION	EVENT
7:30AM - 8:30AM	Café	BREAKFAST WITH THE CORPORATE SPONSORS
8:30AM - 10:00AM	Auditorium	ADVISER SPEAKERS
 <p>8:30 - BUSINESS BUILDING, ALEX LEBRON</p>		 <p>9:00 - LESSONS LEARNED FROM SUCCESSION PLANNING, CHRIS ROCKY</p>
		 <p>9:30 - MASS AFFLUENT STUDY GROUP, BEN FRANKLIN</p>
10:00AM - 11:00AM	Auditorium	KEYNOTE SPEAKER, DALE BROWN
		<p>Dale E. Brown, CAE, is the founding president and CEO of the Financial Services Institute (FSI). Established in 2004, FSI is the only organization advocating on behalf of independent financial services firms and their affiliated independent financial advisors. FSI's mission is to create a healthier regulatory environment for their members through aggressive and effective advocacy, education, and public awareness. FSI represents more than 100 independent financial services firm members and their 160,000+ affiliated financial advisors.</p>
11:00AM - 12:00PM	Auditorium	KEYNOTE SPEAKER, CHARLES PAYNE
		<p>Charles Payne is the Founder, CEO, and Chief Analyst of Wall Street Strategies, an independent stock market research firm he established in 1991 with less than \$10,000 in start-up capital. He is the host of "Making Money with Charles Payne" on FOX Business Network, a role he has held since the show's inception in June 2014. Payne, who began his career on Wall Street in 1985 at E.F. Hutton, is known for his deep financial analysis across both FOX Business Network and FOX News Channel.</p>
12:00PM - 1:00PM	Café	LUNCH WITH THE CORPORATE SPONSORS
1:00PM - 2:00PM	Auditorium	SUPER CE EVENT
<p>The CFD Companies are excited to offer a Super CE Event this year!</p> <p>Earn Life and Health Credits for the year, including CFP, IAR, IWI (CIMA/CPWA), and CFFP (CRPC/CRP) CE credits for home states. You must register through the 2024 What If? Fall Conference registration link to be included. There is no cost to you for your Life & Health home state credits! Upon completion of your CE test here at the home office, your credits will be added to your transcripts, ready for you when you renew your licenses and designations.</p>		



CORPORATE SPONSORS

THANK YOU TO OUR SPONSORS

PLATINUM



GOLD



SILVER



BRONZE



PRESIDENTIAL ADVISER TRIP

GRAND CAYMAN 2024

• The Westin Marriott



Kurt Supe



Jim Guyot



Mick Owens



Chris Rockey



Alex Lebron



Edward Camp



Rick Bain



Kent LaLonde



Brett Bacon



Stuart Breeden



Rich D'Ambola



John Culpepper



Ben Franklin



Brian Quick



Mike Dusold



Orrie Augsburg



Daryl Phillips



Jeff Larimore



Eric Grzegorski



Brent Owens



Tim Kling



Aric Carpenter



Dan Hoelscher



Peter Passalacqua



Bill Clark



James Martin



Terry May



Lisa Raderstorf



Les Miller



Steven Carpenter



Dan Ballister



Gene Griffin



CFD COMPANIES

CFD INVESTMENTS

CREATIVE FINANCIAL DESIGNS



CFD INSURANCE PLANNERS

CFD INSURANCE

CFD BANKING SERVICES



CFD TAX PREPARATION

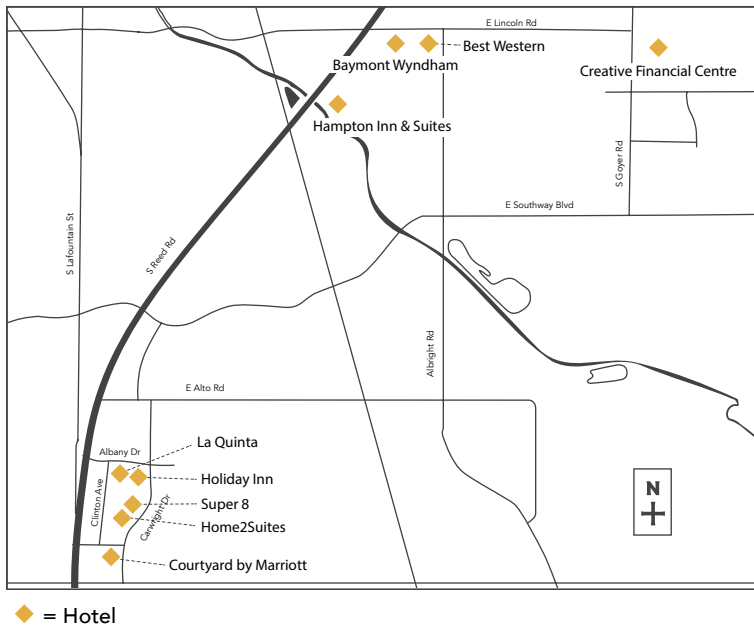
ALTER & ROCKEY

CFD REALTY



HOTEL INFORMATION & MAPS

Kokomo Hotel Accommodations



CFD Conference Blocks

Hampton Inn & Suites:
765.455.2900

Courtyard by Marriott:
765.453.0800

Other Kokomo, IN Hotels

Home2Suites:
765.319.1300

Holiday Inn Express & Suites: 765.450.8085

Super 8 by Wyndham:
765.252.1938

La Quinta Inn & Suites:
765.453.2222

Days Inn & Suites by Wyndham: 765.450.9766

Best Western: 765.453.8822

Baymont by Wyndham:
765.416.6570

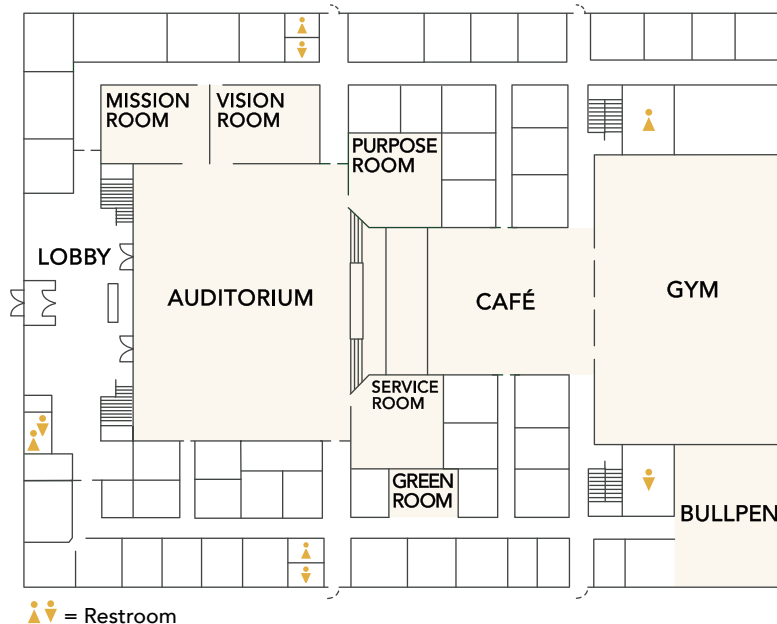
Comfort Inn: 765.252.4818

Westfield, IN Hotels

SpringHill Suites:
317.763.2088

Hampton Inn: 317.763.1900

Creative Financial Centre®



Wednesday 1:00PM - 3:00PM

☐

KREGG ROOZE

5

MATTHEW BAHRENBURG

☐

ZACH COVERT

5

GERRY GOOD & GREG SMITH

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ADVISER SPEAKERS

Wednesday 3:00PM - 4:00PM

3:00

☐ The Tax Triangle of Investing

DAN BALLISTER

3:30

☐ **Brian's Story: Every Adviser on the SUD Frontline**

MIKE DUSOLD

[illegible]

Wednesday 4:00PM - 5:00PM

[illegible]

Thursday 8:30AM - 9:30AM

ADDRESSING THE LATEST CYBER ATTACKS TARGETING THE UNITED STATES

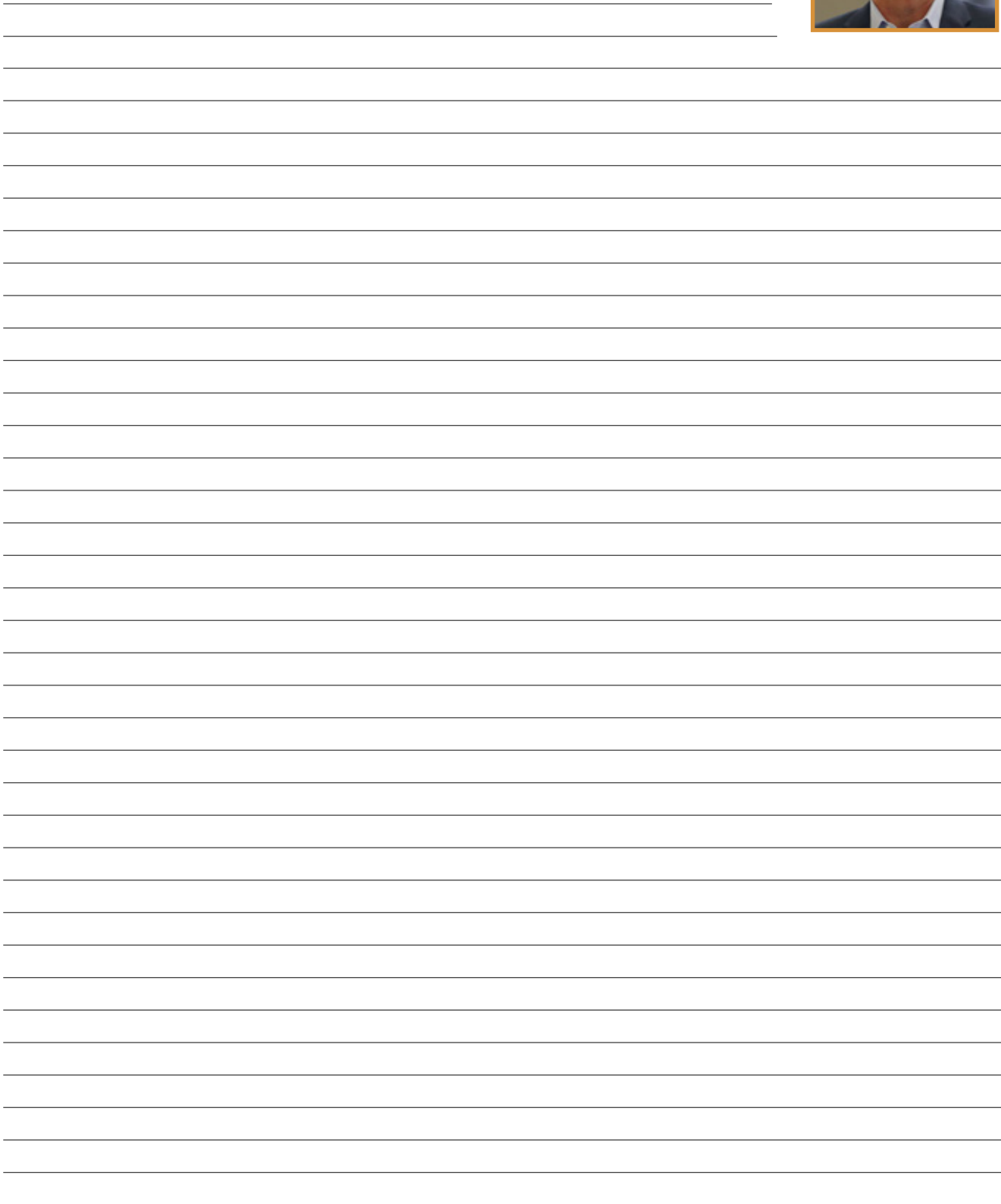
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TEAM CFD MEETINGS

Thursday 9:30AM - 10:00AM

[illegible]

Thursday 10:00AM - 11:00AM



Thursday 11:00AM - 12:00PM

Thursday 11:00AM - 12:00PM

[illegible]

Thursday 1:30PM - 3:15PM

Thursday 1:30PM - 3:15PM

[illegible]

Thursday 3:15PM - 5:15PM

[illegible]

Friday 8:30AM - 10:00AM

9:30
☐ **Mass Affluent Study Group**
BEN FRANKLIN

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Friday 10:00AM - 11:00AM

[illegible]

Friday 11:00AM - 12:00PM

[illegible]

SUPER CE EVENT

Friday 1:00PM - 2:00PM

[illegible]



WHERE THERE IS NO VISION THE PEOPLE PERISH.

Proverbs 29:18

Having a VISION is not optional— it is an absolute necessity for survival! You must figure out your unique purpose in life and how you're going to live out that purpose. Your VISION is simply how you want that PURPOSE to show up in the future. Our VISION is to impact as many people as possible with what we believe is the reality of Jesus Christ. We believe He is both Lord and Savior. We want to serve Him by serving you and helping you serve your clients. It's not about making a bunch of money— It is all about making a difference in the lives of others!! We want to make a difference in people's lives both now and for eternity.

Therefore, we challenge you to take relationships deeper. Help clients to figure out their purpose, power, personal self, other people, and performance fitness. What is their passion; what "fuel" will drive

them; encourage physical, mental, and spiritual health; encourage the development of interpersonal skills so that families stay together and individuals function as a functional part of community; challenge people to develop professional skills to perform at the necessary level to achieve their designed financial goals.

In short, wouldn't it be grand if everyone you come into contact with carried out their unique purpose with passion fueled with Godly wisdom, were physically, mentally, and spiritually fit (going to heaven), living in harmony with their spouse, children, friends, co-workers, etc., and performing jobs that are financially rewarding and making a difference in the lives of others.

Don't perish— get a VISION!!

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