



Join us for this In-Person Program

Thursday, September 24, 2026

8:45 a.m. - 9:30 a.m. Registration

9:30 a.m. - 11:30 a.m. - 2 Hour Az CE Credit Program

"Introduction to Buy-Sell" - Daniel T. Schmaltz

11:30 a.m. - 12:15 p.m. - 1 Hour Inspirational Program

"Finding Confidence When Faith and Belief Are Challenged" - Jim Lutz

Location: Touchstone Wealth - Courtyard Community Room

6263 N. Scottsdale Road, Scottsdale 85250



**DANIEL TIMOTHY SCHMALTZ,
CFP, BFA, CKA, CEPA**

...attended Arizona State University and graduated from the WP Carey School of Business with a Bachelor of Science in Finance in 2000. From 2000-2012, he was an Independent Advisor at Walker Financial and M Financial Group. From 2012-2023, he was a Field Leader for Thrivent Financial serving Arizona and New Mexico. In 2023, he joined Touchstone Wealth as a Senior Vice President.



JIM LUTZ, LUTCF, FICF, CLTC

...has been involved in swimming for over 50 years. He has taught and coached swimmers from novice 'bubble blowers' to those competing on the international stage. He has contributed back to swimming through motivational and inspirational speeches, articles and seminars. He currently works for an insurance company, is a certified life coach, has authored 12 published books with three scheduled for the Fall of 2026.

Introduction to Buy-Sell - 2 Hours CE Credit

This course will introduce the importance of buy-sell agreements and the impact that planning and implementing these agreements can have for your clients. The foundation of any buy-sell agreement would be the understanding of the type of entity that the client has. A review of these entities and an overview of the small business landscape kicks the course into gear. A thorough exploration of what a buy-sell agreement is, and the types available help round out the journey. The course finishes up with a case study on the gifting of a business and ends with a discussion on liquidation.

Come for the Knowledge - Leave with the Vision

CLICK LINK BELOW TO REGISTER - NO FEE FOR NAIFA ARIZONA MEMBERS

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