FALL Program

HELLO FALL

Forget Summer. Fall is where it's at. Don't believe us? Attend this meeting for 'new insights'.

Our fall favorites

Everyone knows about football and foliage, but there's a lot more to Fall if you know where to look.

November 13, 2026

8:45 a.m. - 9:30 a.m. Registration
9:30 a.m. - 10:30 a.m. CE Credit Presentation
10:30 a.m. - 11:30 a.m. Prospecting Program

11811 N. Tatum Boulvard - Suite P120
Phoenix, Arizona 85028

Daniel Schmaltz

"Creative Buy-Sell Planning" (1 Hour Az CE Credit)

This presentation will provide a variety of important topics related to Buy-Sell Planning; to help you understand the tax ramifications of the various strategies, and to understand which strategies might work better in different situations. It will help you understand how to structure and set up the Buy-Sell arrangements for the benefit of your clients and the client's beneficiaries.

Daniel is a Certified Financial Planner (CFP), a Behavioral Financial Advisor (BFA), a Certified Kingdom Advisor (CKA) and a Certified Exit Planning Advisor (CEPA).

William B. Cassidy, CLU, ChFC, LUTCF, CLTC, CEPA

"The Prospecting Problem - SOLVED"

A Proven, Turnkey LinkedIn System for Financial Advisors.
For most financial advisors, prospecting is the biggest obstacle to growing their business. It doesn't have to be! After years of successfully using LinkedIn as a prospecting resource, I've developed a simple, repeatable system that takes the guesswork, frustration, and uncertainty out of finding new prospects.
And I'm going to show you exactly how to do it!
No expensive lead lists. No complicated technology. No reinventing the wheel.

Bill is Managing Partner, Spence, Cassidy & Associates.

NAIFA ARIZONA

Register today!

No fee for NAIFA-Arizona members.

Note: Conference Room is located on the lowest level (P Level) in the south wing of the building. Walk past the coffee station; past the Property Management Office on your left; take hallway to your left. P120 is down the hallway.

Let's get cooking

Register Here

NAIFA- Arizona | P. O. Box 4728 | Scottsdale, AZ 85261 US

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