THE 69TH ANNUAL WILL G. FARRELL PUBLIC SERVICE AWARD &
LEADERS RECOGNITION EVENT

WILL FARRELL
Public Service Award

Join us for the 69th Annual Will G. Farrell Public Service Award and Leaders Recognition Event
Thursday, February 24, 2022,* 11:30 a.m. -1:30 pm - *ZOOM WEBINAR

Speaker: Dr. Daralee Barbera, EdD, CFP®, CMFC®, CLF®, ChFC®, CPBC®

"Client Trust – Win It, Keep It, or Lose It – 4 Advisor Must-Dos"

Client trust is the lifeblood that keeps advisor-client relationships strong. There are 4 simple steps that advisors must master to attract, keep, and build their trusting clients. Although the steps are simple and work, they are not always practiced. Learn what they are, how to do them better, and how to prioritize these steps for success.

About the speaker: Dr. Barbera spent 34 years at Waddell and Reed, starting her career as a financial advisor followed by 30 years in leadership, primarily as a Managing Principal. Her numerous awards included Platinum Member of Chairman's Cabinet (7x), Leadership Council (4x), Leadership Council Chair, Waddell & Reed's prestigious and exclusive *7 C's Award,* and the unique *Crystal Plate Award*. Her division received 35 Gold, Silver, and Bronze level Awards based on sales production. She qualified for Circle of Champions (28x), Crest (16x), and received the GAMA Diamond International Management Award for Financial Planning. Other awards she received were the "2013-2014 Woman of the Year" for WIFS (Women in Insurance and Financial Services), and in 2013, Dr. Barbera was named by Life Health Pro as one of the "20 Women in Insurance You Need to Know." Dr. Barbera was Vice President of Strategic Initiatives and Executive Vice President of Business Development for GAMA International before she entered her newest career in 2020, as President and Principal of Diversified Professional Coaching, LLC. She is adjunct faculty at The American College of Financial Services, teaching in the Master of Science in Management program as well as adjunct faculty at California Lutheran University in the Master of Science in Financial Planning program. Dr. Barbera has co-authored two books and been featured in many magazine articles as well as radio shows.

Speaker: William E. Comfort, CSA®, CSR®, LTCCP®

"The LTC Planning Imperative"

Planning for care is a fiduciary imperative: how to proactively and effectively engage clients; has COVID changed anything/everything; why even "wealthy" clients need LTC insurance

Bill is the owner of Comfort Assurance Group, LLC - a long-term care specialty agency based in St. Louis, Missouri. Bill has served as a MasterClass instructor since 2001. Bill also serves on the CLTC Board of Standards. Bill started his insurance career in 1991, has been a member of a top-selling employee benefits brokerage agency and sold his first LTC insurance policy in 1992. He has specialized exclusively in LTC insurance since 2000. He works with individual clients, financial planners, estate planning attorneys, CPAs, investment firms and other insurance agents to develop and fund effective, integrated LTC plans. Bill has trademarked the phrase "The LTCpro®" to identify his expertise. A former radio and TV reporter, he brings his journalism experience to the complicated world of LTC insurance and long-term care planning as a dynamic speaker, educator and insurance planner. Bill has been quoted in many magazines, publications, and other consumer resources, and he consults nationally on LTC insurance issues with the home care industry.

COST: • *Members of NAIFA & The Society of FSP - $15.00* • *Guests - $20.00*

• *Print out forms from online or register online at the NAIFA-Los Angeles website* www.naifala.org/wfa

Questions: contact NAIFA-LA Executive Director at email Janet@naifala.org or phone 213-500-4946.

Presented by the National Association of Insurance and Financial Advisors, Los Angeles and the LA-Pasadena Chapter of the Society of Financial Service Professionals