

MMA East – At-a-Glance Agenda

Sunday, May 17

12:45 – 3:45pm **Pre MMA Meeting**
Coalition Meeting, sponsored by Women at MassMutual (invite only)

1:00 – 4:00pm **Registration**

4:00 – 5:00pm **General Session**
MassMutual Leadership Panel: Joe Mallee, Liz Forget, Frances Thomas
Real Field Story: Jordan Earles

5:15 – 7:15pm **Welcome Reception & Product Fair**

Monday, May 18

7:00 – 8:00am **Breakfast & Product Fair**

8:00 – 9:30am **General Session**
Keynote Speaker: Tom Wall
Real Field Story: Anastasia Surmava

9:30 – 9:45am Break

9:45 – 12:00pm **Learning Tracks -** Attendees register in advance for specific track.

Track	Accumulator (Picasso 7&8)	Business Owner (Degas)	Pre-Retiree/ Retiree (Cezanne)	High-Net-Worth (Renior)	S1851 Diamond Member (Monet)
Session 1: 9:45-10:45am	**Market/Engage**				**High-Net-Worth**
	Field Faculty: N/A HO Facilitator: **Garrett Schwan & Amanda Masciadrelli**	Field Faculty: **Rick Scruggs** HO Facilitator: **Brian Trzcinski**	Field Faculty: N/A HO Facilitator: **Chazz Logue & Ania Krol-Bowden**	Field Faculty: N/A HO Facilitator: **Matt Whitbread**	Field Faculty: N/A HO Facilitator: **Daken Vanderburg, Michele Collins & Kathryn Wakefield**
10:45-11:00am	Break				
Session 2: 11:00am-12:00pm	**Preparing to Deliver Advice**				**High-Net-Worth**
	Field Faculty: N/A HO Facilitator: **Garrett Schwan & Scott Cuyler**	Field Faculty: **Sahand Elmtalab** HO Facilitator: **Brian Trzcinski & Jarrod DeSantis**	Field Faculty: N/A HO Facilitator: **Chazz Logue, Mark Braley & Ryan Purcell**	Field Faculty: N/A HO Facilitator: **Matt Whitbread, Kelli Stanko & Todd McGee**	Field Faculty: **Abbe F. Large** HO Facilitator: **Michele Collins & Kathryn**

12:00 – 1:15pm **Lunch & Product Fair**

12:00 – 1:15pm **Lunch for Women at MassMutual** (Invite only) - Keynote Speaker: Tamika Catchings

1:15 – 5:15pm **Learning Tracks (continued)**

Track	Accumulator (Picasso 7&8)	Business Owner (Degas)	Pre-Retiree/Retiree (Cezanne)	High-Net-Worth (Renior)	S1851 Diamond Member (Monet)
Session 3: 1:15-2:30pm	**Products/Implementation**				**High-Net-Worth**
	Field Faculty: N/A HO Facilitator: **Garrett Schwan, Rob Purnell, Chris Duke & Brett Schepis**	Field Faculty: N/A HO Facilitator: **Brian Trzcinski, Pat Olearcek, David Curylo & Lindsay Surprenant**	Field Faculty: N/A HO Facilitator: **Chazz Logue, Charly Thornton, Daniel Santos, Drew Thompson & Jean-Marc Pelletier**	Field Faculty: N/A HO Facilitator: **Daken Vanderburg, Kelli Stanko & Araceli Corsini**	Field Faculty: **Colin Kimpel & Ron Gruninger** HO Facilitator: **Michael O'Connor, Michele Collins & Kathryn Wakefield**
2:30-2:45pm	Break				
Session 4: 2:45-3:45pm	**Ongoing Relationship/Life Cycle**				**Practice Management**
	Field Faculty: N/A HO Facilitator: **Garrett Schwan, Rob Purnell, Chris Duke & Brett Schepis**	Field Faculty: **Jeff Carey** HO Facilitator: **Brian Trzcinski & Linda Bestepe**	Field Faculty: N/A HO Facilitator: **Chazz Logue Jean-Marc Pelletier & Matthew Whitbread**	Field Faculty: N/A HO Facilitator: **Michael O'Connor, Alyssa Sweeney, Donna Rowan & Daniel Santos**	Field Faculty: **Travis Mann & Hayley Hill** HO Facilitator: **Kate Cressotti & Robin Parncutt**
3:45-4:00pm	Break				
Session 5: 4:00-5:15 pm	**Advisor Panel – Bring it to life**				**Practice Management**
	Field Faculty: **Warren Pena, Bill Tsoulos, Lynn Bowser & Nick Bonomolo** HO Facilitator: **Garrett Schwan**	Field Faculty: **Jeff Carey, Sahand Elmtalab & Rick Scruggs** HO Facilitator: **Brian Trzcinski**	Field Faculty: **Max Dembow Carmella Stamm** HO Facilitator: **Chazz Logue**	Field Faculty: **Paul Mass Peter Slesinski** HO Facilitator: **Matt Whitbread**	Field Faculty: **Travis Mann & Hayley Hill** HO Facilitator: **Kate Cressotti & Robin Parncutt**

6:00 – 7:30pm **MassMutual Political Action Committee (MMPAC) Reception** (invite only)

6:15 – 7:15pm **Society 1851 Networking Reception** (invite only)

<u>Tuesday, May 19</u>

7:00 – 8:00am **Breakfast**

7:00 – 8:00am **In-language Breakfast – Spanish Speaking** (invite only)

8:00 – 9:00am **General Session**
The American College
Keynote Speaker: Juan Bendana

9:00 – 9:15am Break

9:15 – 10:30am **Elective Session -** Attendees pre-register for an elective session:

Topic	Speakers	Location
Maximizing Advisor Compensation & Benefits with a Balanced Practice	Field Faculty: N/A HO Facilitator: **Leah Ramirez, Jocelyn Hurley, Gail Garvey & Jeff Kuo**	Cezanne



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	Topic	Speakers	Location
	When Time is Money: Turn Minutes into Momentum Using A360 AI To Maximize Efficiency*	Field Faculty: N/A HO Facilitator: **Devin Schwartz & A360 Co-Presenter: Derek Lisinski**.	Degas
	The Backbone of the Advisor Practice: How Core Technology Holds Everything Together*	Field Faculty: **Meghan Pate** HO Facilitator: **Rich Scaife**	Matisse
	Beyond the Basics: Advanced Special Needs Financial Strategies for Today's Advisor	Field Faculty: **Jerry Hulick** HO Facilitator: **Kelly Piacenti**	Renior
	Retirement Income Planning with MM Annuities	Field Faculty: N/A HO Facilitator: **Daniel Santos**	Picasso 7&8
	Society 1851 (Diamond Members only)	Field Faculty: **Suzanne Kimpel, Amy Jamrog, Bailey Shafer & Peter Glassman** HO Facilitator: **Robin Parncutt**	Monet

*Repeated session

10:30 – 10:45am Break

10:45am – 12:00pm **Elective Session -** Attendees pre-register for an elective session:

	Topic	Speakers	Location
	When Time is Money: Turn Minutes into Momentum Using A360 AI To Maximize Efficiency*	Field Faculty: N/A HO Facilitator: **Devin Schwartz & A360 Co-Presenter: Derek Lisinski**.	Degas
	The Backbone of the Advisor Practice: How Core Technology Holds Everything Together*	Field Faculty: **Meghan Pate** HO Facilitator: **Rich Scaife**	Matisse
	The Power of Life Insurance in Estate Planning	Field Faculty: **Sam Eppy** HO Facilitator: **Jeff Morin & Michele Collins**	Picasso 7&8
	The DI Playbook: Proven Practices from Top Advisors	Field Faculty: **Alicia Vivenzio, Keith Wolf & Peter Slesinski** HO Facilitator: **Brett Schepis, Chris Coburn & Dante Sesti**	Renior
	Social Security and Medicare – Two Essential Keys to Successful Retirement Income Planning	Field Faculty: **Craig Fydenkevez** HO Facilitator: **Dave Freitag**	Cezanne
	Society 1851 (Diamond Members only)	Field Faculty: **Hector Otero Santos & Joe Gaglio** HO Facilitator: **Kate Cressotti**	Monet

*Repeated session

12:00pm MMA ends

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