



Syllabus for Continuing Education Program

Program Provider: NAIFA - Minnesota

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Program Chair: Robert Hanten, MRFC LUTCF FICF

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Event: Lunch & CE | Hybrid

Title: How to increase sales with advances in Artificial Intelligence that are shaping the future of Financial Services

Presenter: Thomas Morgan CLF®, Vice President of Life Development, American Senior Benefits | Direct 913-600-2720 | tmorgan@asb.insure

Date: Thursday, March 6, 2025

Program Format: Hybrid

Location: Midland Hills Country Club, 2001 Fulham Street, Roseville, MN 55113 and offered on Zoom.

Time: 11:30 AM Attendee arrival (*In-person*)
12:00 PM Lunch served (*In-person*) and virtual attendees can login.
12:10 PM Welcome and announcements
12:30 PM CE Presentation
1:30 PM Meeting ends

Attendance Fees: All Attendees: \$25

Sponsors: Per benefit package

Refunds: No refunds for cancellations received after 2/28/2025 or for no show attendees.

CE Credits: This educational offering is APPROVED by the Minnesota Commissioner of Commerce as satisfying one hour of STANDARD classroom credit toward continuing insurance education requirements.

CFP: 1.0-hour Standard credit APPROVED.

CLE: 1.0-hour Standard credit APPROVED.

A certificate of attendance is available for individuals requesting CPE and PRP (Professional Recertification Program – formerly PACE) credits.

NAIFA-Minnesota

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Who Should Attend: Estate planners, financial planners, investment advisors, insurance producers, retirement counselors, CPAs and JDs.

Level of Educational Complexity: Overview

Course Description

8 Ways to use AI Tools when building Strong Business Referral Partnerships. Unlock the Power of Referral Partnerships in a Tough Market

Referral partnerships are vital for success in any market, but they become absolutely essential when times are tough. Imagine having 20 or 30 referral partners sending you a steady stream of business each month. Sounds incredible, right? Yet, most agents aren't actively pursuing these valuable relationships. Why? Because they don't know how.

This exciting, free 45-minute class is where you'll discover the secrets to building and maintaining effective business referral partnerships. This is not just another lecture. This is a hands-on, step-by-step workshop designed to equip you with everything you need to succeed.

Learning Objectives

- Identify the best referral partner candidates – Know who to target.
- Locate their contact information – Find out how to get in touch.
- Send effective communication – Make the right impression from the start.
- Nurture your referral partners – Keep them engaged and sending you business.
- We'll dive deep into the four types of referral partnerships: Direct Referrals, Networking Partners, Branding Partners, and Cost-Share Partners. You'll leave this class with a clear action plan and the confidence to build strong, lasting partnerships that will keep your business thriving.

Outline

- I. **Summary** Discusses the potential of artificial intelligence in expanding businesses and improving communication with referral partners. Explores the use of AI tools like ChatGPT, Zapier, Apollo dot I/O, and Otter AI for lead generation, content creation, workflow automation, and meeting management. The importance of treating referral partners like family and the potential of AI in personalized marketing, data analysis, and sales prediction are also highlighted.
- II. **AI's Role in Business Expansion and Sales Efficiency** Discusses the importance of artificial intelligence (AI) in expanding businesses and freeing up valuable time for sales. Highlights the potential of AI in personalized marketing, data analysis, and sales prediction.
- III. **Effective Referral Partner Management With AI** Emphasizes the importance of treating referral partners like family. Uses of AI tools to free up time and resources, and partners with various businesses to expand reach. Four types of referral partners: direct referrals, branding partners, networking partners, and resource partners. Utilizing AI for lead generation, reaching out to potential partners like accountants and financial advisors. Stresses the need to refine communication templates using tools like ChatGPT to better engage target audiences.
- IV. **Exploring AI Tools for Content Creation and Automation** Discusses the use of Chat GPT in creating content and demonstrates its application in writing an email to a mortgage broker. Emphasizes the importance of using appropriate language and jargon for the target audience. Introduction of AI tools like Zapier and Apollo dot I/O, explaining their potential to streamline processes and save time. Highlights the importance of Zapier as a tool that connects other tools and asked if anyone was currently using it. Lastly, the creation of an AI voice assistant and an AI text chat bot for scheduling appointments, answering FAQs, and providing product/service information. Dialing live to test the AI voice assistant by dialing a specific number.

- V. **AI Virtual Assistants and Referral Partnerships** Discussed the use of AI virtual assistants for customer service, particularly in handling Medicare and life insurance inquiries. Emphasizes the importance of partnerships with experts in these fields to provide the best service. Also highlights the use of Slack for communication with referral partners, creating individual channels for each to track the progress of referrals.
- VI. **AI in Zoom Web Meetings and Otter AI Usage** Discusses the use of AI in Zoom web meetings for automatically recording, transcribing, and generating summaries of meetings. Also highlights the use of Otter AI for managing multiple meetings simultaneously by logging into them as him and generating notes and summaries. Emphasizes the cost-effectiveness of using such AI tools compared to hiring someone for recording meetings.
- VII. **AI Tools for Business Referral Partnerships** Discusses the use of AI tools for business referral partners, outlining a multi-week outreach strategy that includes phone calls, emails, text messages, social media DMs, Zoom Meetings, and face-to-face meetings. Emphasizes the importance of maintaining contact without overwhelming partners and using Zapier to automate workflows. Also highlights the use of AI tools like Slack and Otter AI for communication and meeting notes.
- VIII. **Next steps**
- Attendees to consider implementing Zapier to connect and automate their existing tools and workflows.
 - Attendees to explore using Slack or Microsoft Teams for communication with referral partners.
 - Attendees to investigate using AI-powered tools like Otter.ai for automated meeting transcription and summaries.
 - Attendees to consider implementing a multi-week outreach strategy for maintaining contact with referral partners.

Total time: 60 Minutes

Instructional Materials for Registered Attendees: Handouts if any will be included in the confirmation email to registered attendees.

Examination & Answers: No exam

About the Speaker: Attached



Tom Morgan

Vice President of Life Development

American Senior Benefits

Tom Morgan has been in the Financial Industry for 35+ years, and has used his relationships and experience to build a life insurance sales system that is revolutionizing the industry

The age-old philosophy is to “put the client first” and the outcome will take care of itself. The difference maker is the ability for a Medicare, Property and Casualty, or even Wealth Management agency to partner with true specialists in life insurance.

Our partnership with NAIFA has given us the ability to introduce Medicare, Property and Casualty, and Wealth Management agencies to the trusted, experienced life insurance specialists that comprise the ASB Special Markets agents within NAIFA’s membership.

In a recent statement Tom said:

“These partnerships are forging the future of the financial services industry.”

Imagine a world where Medicare, Property and Casualty, and Wealth Management Firms are afforded the luxury to provide much needed Life Insurance Specialists to their clients. In exchange the Life Insurance Specialists are given the same luxury to provide much needed Medicare, Property and Casualty, and Wealth Management services to their clients.

Tom’s presentations include:

“Oh Crap! My client asked me about Medicare, now what?”

(Presented at NAIFA APEX)

“The Purpose of Life” Roadshows across the country with industry icon “Joe Jordan”

“The Evolution of Life Insurance” – Why Living Benefits claims now exceed Death Claims