



2025 JULY CONFERENCES

June 28 - July 1 NABIP: Future Forward: Annual Convention @ Miami, FL

EVENTS

July 7 @ 2:30-4pm EPI: The Five Conversations That Drive Business Succession Planning @ SF, CA

July 9 @ 2:30-4:30pm EPI: Investigating Exit Options From Various M&A Expert Perspectives @ San Diego, CA

July 10 @ 2:30-4:30pm EPI: Investigating Exit Options From Various M&A Expert Perspectives @ Costa Mesa, CA

July 16 @ 11am-1:00pm EPI: Disaster Preparedness & Contingency Planning For Exit-Ready... @ Westlake Village, CA

July 17 @ 9am-12pm NAIFA CA: Inland Empire's Mastering the Course: Insights for Industry Leaders @ Corona, CA

July 23 @ 2:30-4:30pm EPI: Coaching Business Owners To Maximize And Grow The Value Of Their Business @ LA, CA

July 24 @ 11:30am-1:30pm EPI: The Ripple Effect: How Tariffs Influence Business Valuation In A Global... @ Norco, CA

VIRTUAL EVENTS

July 1 @ 8:30-10am NAIFA LA: Advanced Estate Planning - Zoom

July 10 @ 12-1pm NAIFA CA: How Millions of Homeowners Can Now Afford LTC Insurance - Zoom

July 22 @ 4-5pm NABIP: Medicare Insider Moments: Ready, Set, AEP - Zoom

July 23 @ 3-4pm NABIP: Power Hour - Zoom

Juy 24 @ 12-1pm NABIP: New Member Orientation - Zoom



RECORDED WEBINARS

Benefit Mall / CRC Benefits Compliance Webinars

Benefit Mall / CRC Benefits January Compliance Update Webinar w/ Misty Baker

Benefit Mall / CRC Benefits February Compliance Update Webinar w/ Misty Baker & Carol Taylor

Benefit Mall / CRC Benefits March Compliance Update Webinar: RxDC Explained w/ Misty Baker & Carol Taylor

Benefit Mall / CRC Benefits April Compliance Update Webinar: MLR & 5500 w/ Misty Baker & Carol Taylor

Benefit Mall / CRC Benefits May Compliance Update Webinar w/ Misty Baker & Carol Taylor

Benefit Mall / CRC Benefits June Compliance Update Webinar w/ Misty Baker & Carol Taylor

Commission Solutions 2025 Webinars

Commission Solutions January 8, 2025 Webinar: Mary's Journey To Protect, Grow and Sell Her Commissions

Commission Solutions January 16, 2025 Webinar: How to Sell Your Health Insurance Book of Business

Commission Solutions February 12, 2025 Webinar: Rick's Journey to Protect, Grow, and Sell his Commissions

Commission Solutions February 20, 2025 Webinar: How To Use Advanced Tax Planning/Maximizing Retirement Income

Commission Solutions March 12, 2025 Webinar: How Health Commissions Were Protected and How the Plan...

Commission Solutions March 20, 2025 Webinar: How to Use Advanced Tax Planning for Maximizing Retirement Income

Commission Solutions April 9, 2025 Webinar: Broker Succession Planning and the Impact on Loved Ones

Commission Solutions April 17, 2025 Webinar: Help Baby Boomers as their Preferred Byer and Successor



SAVE THE DATE

Sept 4 @ 8am-5pm CAHIP LA: 2025 Medicare Summit

Sept 9 - 11 CAHIP OC: 13th Annual Senior Summit @ Temecula, CA

PARTNERS

BenefitMall / CRC Benefits Resources

Covered California: Important Tax Information: How to get a Small Business Credit

IEHP: Health Education for Members Join no-cost health education classes just for IEHP members.

Pinnacle: Announcing Healthview, Refreshed: Simply A Better Experience

Sutter Health Plan: Prioritizing Mental Wellness