



## NEWS

### For immediate release

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## Securities America's Advisors Connect at 2011 National Conference

LA VISTA, Neb. (June 23, 2011) – [Securities America](#) hosted its annual conference June 11-14, in Orlando, Fla. Focused on the company's initiatives in the areas of retirement income distribution, business growth and ease of doing business, the conference offered more than 90 educational sessions and attracted nearly 1,000 attendees.

"I see only great things ahead for Securities America, for you and for your clients," President and CEO Jim Nagengast told advisors in his opening remarks.

Kicking off the event was *Next Phase™ University*, an all-day preconference session dedicated to Securities America's unique [Next Phase™](#) Retirement Income Distribution program that advisors can use to distinguish themselves in their markets. On the first day of the main conference, income distribution planning continued to be a focus, with an entire track devoted to the topic, including introduction of three new resources: an Income Distribution Desk, an expanded Client Fact Finder system and new Product Allocation Models. The Income Distribution Desk is the first of its kind in the industry, said Zachary Parker, Securities America director of insurance and annuities.

Other highlights of the conference included:

- Introduction of the unique Unified Managed Account option being offered on the Managed Opportunities platform, which can bring mutual fund wrap strategies and separate managed accounts into one account
- New Social Media training and compliance initiative that will enable advisors to participate on LinkedIn, Twitter and Facebook, by using Socialware to ensure adherence to regulatory requirements
- The rollout, *free to all Securities America advisors*, of a mobile access solution for smart phone and tablet technology
- Introduction of Interactive Client Surveys, the latest in the *New Conversations* series, developed in conjunction with Dan Allison and [Feedback Marketing Group](#) to help advisors hone their referral strategies

- Session on data security addressing changes advisors need to make in handling, transmission, storage and destruction of client data

This year's *Super Women's Summit Luncheon*, hosted for the fourth consecutive year by Janine Wertheim, Securities America senior vice president and chief marketing officer, featured presentations from top women advisors about creating success in their personal and professional lives as well as their current business growth plans and insights on how they soar in the financial services business.

As in years past, the conference included a full day of sessions for assistants and office managers on topics such as marketing and PR, managing client relationships, managing for high performance teams, and saying "goodbye" to filing cabinets. There were also several sessions for associate advisors, including the enhancement of a coaching program to help advisor teams lay the framework for growth and succession planning.

#### ***About Securities America***

Headquartered in La Vista, Neb., Securities America, Inc. has more than 1,800 financial professionals nationwide with approximately \$46 billion in client assets under their supervision. Securities America Advisors, Inc. is an SEC-Registered Investment Advisory firm with more than \$15 billion in assets under management and administration that offers investment management, financial advice and financial planning through financial advisors. For more than 25 years, Securities America's mission has been to foster the success of financial professionals so they can provide quality, objective counsel and services to their clients. Additional information is available at [www.securitiesamerica.com](http://www.securitiesamerica.com).

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