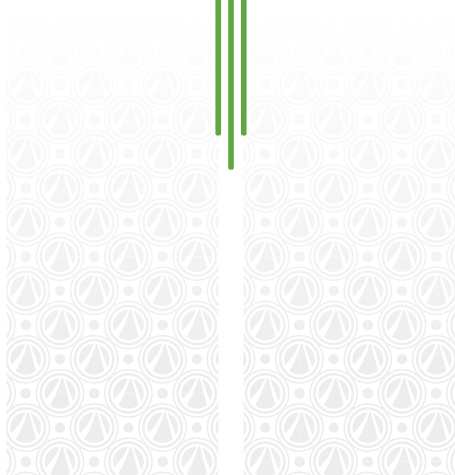




**MEET**

# **YOUR TEAM**





**TEAM EXCELERATE**



**TEAM EXCELERATE**





## PHIL BLOSSER

### VICE PRESIDENT OF ADVISOR DEVELOPMENT

Phil has been supporting the nation's top producers at Advisors Excel since 2013. With experience in the industry since 2003, he helps advisors as a business coach, guiding them in leadership, business vision, development, and business scaling. Phil graduated from Washburn University with degrees in Psychology and Criminal Justice.

Phil is a great resource in the following areas:

- Leadership
- Business Vision
- Business Development
- Sustainable Scaling

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YOUR AE TEAM



## DAN COUTURE

### VICE PRESIDENT OF MARKETING

Dan has been supporting the nation's top producers at Advisors Excel since 2012. With experience in the industry since 2001, he has worked with more than 550 offices affiliated with AE helping them craft strategies to improve their marketing programs and client meetings. Dan currently assists advisors by developing efficient and effective marketing strategies, seminar marketing, refining their sales process, and conducting current marketing analysis.

Dan is a great resource in the following areas:

- Seminar Marketing
- Efficient and Effective Marketing Strategies
- Sales Process
- Marketing Analysis

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## DALLAS JOHNSON

### ADVISOR DEVELOPMENT COACH

Dallas has been supporting the nation's top producers at Advisors Excel since 2007. With experience in the industry since 2000, including 3 years at a bank as a financial professional, he coaches advisors on annuity product questions, reporting, growing and scaling their advisory business, and best practices for servicing clients and prospects. Dallas graduated from Emporia State University with a Bachelor of Science in History and Political Science.

Dallas is a great resource in the following areas:

- Annuity Products
- Obtaining Reports
- Business Coaching
- Best Practices on Servicing Clients & Prospecting

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YOUR AE TEAM



## KELLI KENNEY

### ADVISOR DEVELOPMENT COACH

Kelli has been supporting the nation's top producers at Advisors Excel since 2010. With experience in the industry since 2000, including 7 years at a previous FMO and 4 years as an advisor, she provides guidance on annuity product questions, reporting, business growth coaching, and best practices in organization and operations. Kelli graduated from Kansas State University with a degree in Financial Planning.

Kelli is a great resource in the following areas:

- Annuity Products
- Obtaining Reports
- Business Coaching
- Best Practices on Servicing Clients & Prospecting
- Book of Business Transfers

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**NICK GITTO, MBA, CFP<sup>®</sup>, CPWA**

## **DIRECTOR OF ANNUITY PLANNING**

Nick has been supporting the nation's top producers at Advisors Excel since 2015. He collaborates with advisors as a product and advanced planning professional, assisting in achieving clients' goals through his product knowledge and advanced case planning skills. Nick graduated from Washburn University with a bachelor's degree in Business Administration as well as a Master of Business Administration. Additionally, he received his CFP<sup>®</sup> professional designation in 2020.

Nick is a great resource in the following areas:

- Advanced Annuity Planning
- Positioning Annuity Products for Clients
- Financial Planning
- Analyzing Data

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YOUR AE TEAM



## DEXTON SWINEHART

### SENIOR ANNUITY PLANNER

Dexton has been supporting the nation's top producers at Advisors Excel since 2023. With experience in the industry since 2022, he provides expertise in high-level annuity product questions, replacing and upgrading old annuity products, handling escalated annuity problems, and offering assistance in financial planning using annuities. Dexton graduated from Emporia State University with a degree in Interdisciplinary Studies.

Dexton is a great resource in the following areas:

- Annuity Products
- Position Annuity Products for Clients
- Suitability Requirements
- Analyzing Data

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## DAVE LAGUE

### VICE PRESIDENT OF SALES

Dave has been supporting the nation's top producers at Advisors Excel since 2017. With experience in the industry since 2015, he assists advisors with phone sales training for employees, best practices in sales and business scaling, cashflow and profitability, and seminar productivity. Dave graduated from John Brown University with a Bachelor of Science in Business Administration.

Dave is a great resource in the following areas:

- Phone Sales Training
- Best Practices in Sales
- Business Scaling
- Cashflow and Profitability
- Seminar Effectiveness

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YOUR AE TEAM



## DANIEL HOTUJAC

### VICE PRESIDENT OF SALES

Daniel has been supporting the nation's top producers at Advisors Excel since 2017. With experience in the financial industry since 2015, he advises producers on best practices related to scaling, business techniques, along with strategic thinking and planning. He is also exploring new relationships with prospective advisors. Daniel graduated from Washburn University with a Bachelor of Arts in Integrated Studies and from the University of Northern Colorado with a Master of Science in Business and Sports Administration.

Daniel is a great resource in the following areas:

- Best Practices in Podcasting
- How to Build a Newsletter
- Techniques in Business Scaling
- Strategic Thinking and Planning

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## RYAN KEY

### DIRECTOR OF SALES AND MARKETING

Ryan has been supporting the nation's top producers at Advisors Excel since 2023. With experience in the financial industry since 2022, he advises producers on best practices related to scaling, business techniques, along with strategic thinking and planning. He is also exploring new relationships with prospective advisors. Ryan graduated from Washburn University with a Bachelor's in Business Communications.

Ryan is a great resource in the following areas:

- Best Practices in Sales
- Strategic Thinking and Planning
- Phone Sales Techniques
- Leveraging Opportunities
- Shared Successes and Best Practices from Top Offices

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YOUR AE TEAM



## MORGAN HANSEN

### RELATIONSHIP MANAGER

Morgan has been supporting the nation's top producers at Advisors Excel since 2015. With industry experience since 2014, she helps facilitate executive decisions, licensing and contracting questions, AE events, strategy visits, TV shoots, office management, and onboarding with AE. Morgan graduated from Washburn University with a Bachelor of Science in Elementary Education.

Morgan is a great resource in the following areas:

- Coordination of Phil Blosser's Calendar
- Licensing and Contracting with AE
- AE Events
- Strategy Visits | TV shoots
- Office Manager | CRM questions
- Onboarding with AE

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## CASSIE JOHNSON

### RELATIONSHIP MANAGER

Cassie has been supporting the nation's top producers at Advisors Excel since 2019. She helps with AE events, pre-onboarding advisor event liaison, studio shoots, strategy visits, marketing analysis, ideas, conversions, and digital marketing development, and specializes in Snappy Kraken. Cassie graduated from Drake University with degrees in International Business and Marketing.

Cassie is a great resource in the following areas:

- AE Events
- VIP Visits | Studio Shoots
- Office Manager | CRM questions
- Marketing Analysis
- Digital Drip Marketing
- Customer Service

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YOUR AE TEAM



# TRISTAN JURGENSMEIER

## TEAM SUPPORT SPECIALIST

Tristan has been supporting the nation's top producers at Advisors Excel since 2017. She helps with AE events, DBR access, commission statements and questions, and production reporting.

Tristan is a great resource in the following areas:

- AE Events
- DBR Access
- Office Manager/CRM questions
- Commission Statements/Questions
- Reporting

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