Please contact the speakers directly if you are interested in having them present at any of your events. To be included in the IDIS Speaker’s Bureau a member must be in good standing of the International DI Society.

For concerns or questions contact the IDIS Offices.

Tel: 562.481.2381 or Email: info@internationaldisociety.com

The Speakers Bureau Disclaimer is located on the last page of the Speakers Bureau. We ask that you please review the disclaimer prior to contacting any of the speakers listed.
Corey Anderson
DI Geek

Address: 11247 69th St. NE, Albertville MN 55301
Email: disabilitygeek@disabilitygeek.com
Website: www.disabilitygeek.com
Telephone: 844-700-GEEK

Length of Time in the Disability Insurance Industry: 10-20 Years
Areas of expertise within the Disability Insurance Industry: Sales, Process, Electronic Only Sales Process, Mentorship, Broker’s Broker, Accountability Groups

Titles of previous presentations: "Protecting the - instead of the", "Revenue Opportunities in Your File Drawer", "How to Sell Disability Insurance", "A Broker's Broker and His Perspective"

Speaker Fees: $500
Travel Expenses: Yes
Are you approved for CE in any states? Yes

Kenneth Bloch, CLU, Sr.
The Bloch Agency

Address: 5950 Fairview Road, Suite 225, Charlotte, NC 28210
Email: Ken@plusgroupnc.com
Website: www.plusgroupnc.com
Telephone: 704-643-0999

Length of Time in the Disability Insurance Industry: Over 20 years
Areas of expertise within the Disability Insurance Industry: Marketing, Product Design, Underwriting from a field point of view

Titles of previous presentations: IDIS Meeting - "Individual and Group Working Together", SC Health Underwriters - "Disability Key Person" NAIFA - many local presentations regarding Disability Insurance.

Speakers Fee: No
Travel Expenses: If fairly local, No, otherwise Yes
Are you approved for CE in any states? Yes
Chase Brakke, DIA, DIF
North Star Resource Group

Address: 2701 University Ave SE, Minneapolis, MN 55414
Email: chase.brakke@northstarfinancial.com
Website: www.northstarfinancial.com
Telephone: 612-617-6008

Length of Time in the Disability Insurance Industry: 5-10 years

Areas of expertise within the Disability Insurance Industry: Disability Sales, Expertise Medical Market/ Business Owners/ White Collar Specialist utilization

Titles of previous presentations: "Income Protection for Everyone Using a DI Specialist" "Grow your Production DI for Small Business Owners"

Speakers Fee: Donation Only

Travel Expenses: Ground Transportation, Accommodations, and Airfare - Typically I just ask for airfare, taxi, and hotel. I request a donation to our charitable foundation if I’m asked to travel outside of Minnesota. The donation depends on the size of the group.

Are you approved for CE in any states? No

Chris Carlson, CLU, ChFC - The DI Coach

Address: Seattle, WA
Email: chris@thedicoach.net
Website: www.dicoach.net
Telephone: 206.419.7440

Length of Time in the Disability Insurance Industry: over 20 years

Areas of expertise within the Disability Insurance Industry: Sales and Marketing

Titles of previous presentations: "Maximizing Your D.I. Opportunities"

Speakers Fee: Yes

Travel Expenses: Please contact me directly

Are you approved for CE in any states? No
**Robert Clark**  
Petersen International Underwriters  
*Address:* 23929 Valencia Blvd. Second Floor, Valencia, CA 91355  
*Email:* Robert@piu.org  
*Website:* www.piu.org  
*Telephone:* 800-345-8816  
*Length of Time in the Disability Insurance Industry:* 1-5 years  
*Areas of expertise within the Disability Insurance Industry:* Sales and Marketing  
*Titles of previous presentations:* "21st Century Asset Protection", "What's New in Income Protection"  
*Speakers Fee:* Sometimes  
*Travel Expenses:* Please contact me directly  
*Are you approved for CE in any states?* Yes

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**Rick Cordaro, LUTCF, DIA, DIF**  
Principal Financial Group  
*Address:* West Des Moines, IA 50266  
*Email:* cordaro.rick@principal.com  
*Website:* www.principal.com/cordaro  
*Length of Time in the Disability Insurance Industry:* Over 35+ years  
*Areas of expertise within the Disability Insurance Industry:* 30+ years, Moderated LUTC-DI for over 25 Years. Authored several articles on the topic. Helped develop DI courses for AHIP  
*Titles of previous presentations:* "Trends in DI Solutions for Highly Compensated Underwriting DI"  
*Speakers Fee:* No  
*Travel Expenses:* Accommodations, Airfare  
*Are you approved for CE in any states?* Yes
Jim Farden, CLU  
Principal Financial Group  
Address:  Palm Springs, CA  
Email:  farden.jim@principal.com  
Website:  www.principal.com/farden  
Telephone:  415-202-3500  
Length of Time in the Disability Insurance Industry:  Over 20 years  
Areas of expertise within the Disability Insurance Industry:  Full Underwritten Individual Disability and Guarantee Issue Disability  
Titles of previous presentations:  Over 30 years of Individual Disability Presentations  
Speakers Fee:  No  
Travel Expenses:  Please contact me directly  
Are you approved for CE in any states?  Yes

Art Fries, RHU  
Address:  Central Coast, CA  
Email:  friesart@hotmail.com  •  Website:  www.afries.com  
Telephone:  800-567-1911 or 805-343-6400  
Length of Time in the Disability Insurance Industry:  Over 20 years  
Areas of expertise within the Disability Insurance Industry:  Since 1963 (52) years. Was in the property/casualty business for 10 years from 1962 to 1972. Will talk ONLY on disability claims.  
Titles of previous presentations:  Certainly over 50.  
Speakers Fee:  Donation Only  
Travel Expenses:  Ground Transportation, Accommodations, Airfare, Meals and Incidental Expenses  
Comment:  Local talk or anywhere in USA that would interest me.  
Are you approved for CE in any states?  No
Fred W. Gosman, III, CPA, CFF
Royal Claims Advocate

Address: 4132 Atlanta Highway, Suite 110-301, Loganville, GA 30052

Email: fred@royalclaimsadvocates.com

Website: www.royalclaimsadvocate.com

Telephone: 855.828.4100

Length of Time in the Disability Insurance Industry: Over 20 years

Areas of expertise within the Disability Insurance Industry: I am a partner in a consulting firm that focuses on helping individual clients with the demands of the disability claim process. I have personally presented and analyzed all types of disability claims, specifically addressing individual disability income and overhead expense benefits, buy-sell claims, residual versus total disability, and integration with group and Social Security disability. I have also produced the information and exhibits required to prove occupations, duties, medical conditions, and financial results.

Titles of previous presentations: I have given more than 20 presentations, ranging from issues involved in mental and nervous condition claims, to claim presentations for self-employed professionals, to understanding the techniques used by field investigators.

Speakers Fee/Travel Expenses: Speaking fees and expenses are set depending on the nature and purpose of the event.

Are you approved for CE in any states? No
Andra Grava, CLU, RHU
DI Center of Dallas
Member NAIFA, NAHU, SFSP, FPA, IDIS, AALU, GAMMA, Past President NAIFA-Dallas, DAHU, Texas Leaders Roundtable Past Chair for NAHU DI Advisory Group, CLU, RHU Advisor of the Year for NAIFA-Dallas, Henry Dawson Award for DAHU 2015.

Address: 40 E. McDermott Dr., Allen, TX 75002
Email: AGrava@TheDICenter.com
Website: www.thedicenter.com
Telephone: 972-774-9663

Length of Time in the Disability Insurance Industry: Over 20 years
Areas of expertise within the Disability Insurance Industry: Brokerage, Sales, Recruiting, Technology, Practice Management

Titles of previous presentations: "DI is Sold", "The Tech Savvy Advisor", "Not your Father's DI", "Paycheck Protection or Prevention Insurance", "Making DI Easier", "11 Common Mistakes Producers make with Disability Insurance".

Travel Expenses/Comment: For local associations I normally cover all costs. Companies normally pay for travel expenses.
Are you approved for CE in any states? Yes

Craig Gussin, CLU, DIF
Auerbach & Gussin Insurance & Financial Services, Inc.

Address: 4330 La Jolla Village Drive #330, San Diego, CA 92122
Email: craig@auerbachandgussin.com
Website: www.auerbachandgussin.com
Telephone: (858) 546-4101

Length of Time in the Disability Insurance Industry: Over 20 years
Areas of expertise within the Disability Insurance Industry: DI, group and individual and how it relates to the ACA

Titles of previous presentations: SS, DI and the ACA
Speakers Fee: No
Travel Expenses: Please contact me
Are you approved for CE in any states? No
Bob Herum, MSFS, CLU, ChFC, RHU, REBC, DIF
2nd VP, DI Sales - Ameritas

Address: Cincinnati, OH
Email: BHerum@ameritas.com • Website: www.ameritas.com
Telephone: 513-595-2194

Length of Time in the Disability Insurance Industry: 29 years, Past President of IDIS

Areas of expertise within the Disability Insurance Industry: Individual and group LTD and STD Plan design Sales Ideas Disability Need Salary Continuation Planning

Titles of previous presentations: "The Best Sales Ideas DI; Why Now?", "DI Boot Camp" , "How to Become a DI Expert", "How to Develop a Salary Continuation Plan"

Speakers Fee: No • Travel Expenses: Please contact me
Are you approved for CE in any states? No

Keith Hoffman
VP Disability Corporate Benefits - NFP Partners

Address: 1250 Capital of Texas Highway S., Bldg. 2, Ste. 125
Austin, TX 78746
Email: khoffman@NFP.com • Website: www.nfp.com
Telephone: Direct: 512.697.6155/Cell: 512-706-5545

Length of Time in the Disability Insurance Industry: Over 20 years

Areas of expertise within the Disability Insurance Industry: Recruitment, Education and Motivation. I specialize in Disability Sales Training for the Advisor.

Titles of previous presentations: "Marketing to Meet the Needs", "Gone with the Wind", "Double Your Coverage…Same Cost", "A Knife Doesn't Work in a Gunfight", "The Indestructible Supermom", "Group Already Provided".

Speakers Fee: No

Travel Expenses/Comment: I will not charge if I'm able to be in a location for other business reasons as well as the speaking engagement.

Are you approved for CE in any states? No
Gerald "Gerry" Katz, MSPA, RHU, ALHC, FACFE, DABDA
Disability Claim Consultant & Expert Witness
Address: 1433 Camellia Circle, Weston, FL 33326
Email: disability@disabilityconcepts.com
Website: www.disabilityconcepts.com
Telephone: 877-776-3948
Length of Time in the Disability Insurance Industry: Over 50 years
Areas of expertise within the Disability Insurance Industry: Disability Insurance Claims, Marketing Buy Sell Disability & Office Overhead Income and, List-Bill Association Marketing of Disability Insurance
Speakers Fee: Sometimes
Travel Expenses: Ground Transportation, Accommodations, Airfare, Audio Visual.
Are you approved for CE in any states? Yes

Maureen Kirschhofer, CLU, ChFC - DOC-DI
Address: Jacksonville, FL
Email: maureen@doc-di.com
Website: www.doc-di.com
Telephone: 904-703-9654
Length of Time in the Disability Insurance Industry: Over 20 years
Areas of expertise within the Disability Insurance Industry: Marketing DI Sales
Titles of previous presentations: "Marketing to Develop the DI Income Sale"
Speakers Fee: No
Travel Expenses: Accommodations, Airfare, Audio Visual
Are you approved for CE in any states? No
Bryan Kuderna, CFP, LUTCF
Kuderna Financial Team

Address: 1040 Broad St., Ste. 202, Shrewsbury, NJ 07702
Email: BKuderna@planningalliance.com
Website: www.planningalliance.com
Telephone: (848) 456-3057

Length of Time in the Disability Insurance Industry: 5-10 years
Areas of expertise within the Disability Insurance Industry: Medical Market
Titles of previous presentations: "Protecting Your Biggest Asset Disability Insurance for Physicians"

Speakers Fee: Sometimes
Travel Expenses: Please Contact Me
Are you approved for CE in any states? Yes

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Greg Nelson, ChFC, CEBS, DIF

Address: 520 Purple Lilac Lane, Sandy, UT 84070
Telephone: 801-304-7706 or 801-860-6552

Length of Time in the Disability Insurance Industry: Over 25 years
Titles of Presentation: Many, including: DI: Bridging the DIquicken with Clients, Disability Insurance: The Keystone to Your Financial Plan, Disability Income Protection and Your Financial Security

Speakers Fee/Travel Expenses: Speaking fees and expenses are set depending on the nature and purpose of the event.
Comment: Have worked with many Agencies to help their agents do more disability insurance, as well as joint work in over 40 States
Are you approved for CE in any States? In Utah, and can be for other States if needed
Ben Nordman  
Managing Partner NorthCentral DI

Address: 17645 Juniper Path, Suite 225, Lakeville, MN 55044  
Email: ben@northcentraldi.com • Website: www.northcentraldi.com  
Telephone: 952.467.8880 direct/612.910.1699 mobile

Length of Time in the Disability Insurance Industry: over 20 years

Areas of expertise within the Disability Insurance Industry: All IDI products, including fully underwritten, GSI programs, impaired risk and surplus products (Lloyds etc.).

Titles of previous presentations: "DI De-Mystified for the Middle Markets", "DI Industry State of the Union", "DI for Business Needs", "GSI Opportunities in the Marketplace".

Speakers Fee: No

Travel Expenses/Comment: No fee if local NAIFA chapters or similar groups. IF further/overnight travel is required, then lodging/airfare will need to be covered. I conduct meetings as a way to help provide DI education vs. a profit-making element of my business.

Are you approved for CE in any states? Yes

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Tom Petersen, MBA, RHU  
Vice President, Petersen International

Address: 23929 Valencia Blvd. Second Floor, Valencia, CA 91355  
Email: ThomasPetersen@piu.org • Website: www.piu.org  
Telephone: 800-345-8816

Length of Time in the Disability Insurance Industry: over 20 years

Areas of expertise within the Disability Insurance Industry: Marketing and Sales Motivation Legislation, Claims

Titles of previous presentations: "Preventing the Whirlpool Effect ", "Asset Protection using Disability Insurance ", "Tarzan, the IRS and Jane Too! ", "Do the Statistic Lie?"

Speakers Fee: Sometimes

Travel Expenses: Please Contact Me

Are you approved for CE in any states? Yes
Tom Petsche, Sr., CLU, ChFC, RHU, DIF, DIA
Brokerage Solutions, Inc.

Address: 3979 Park Towne Court NE, Cedar Rapids, IA 52402
Email: tom@brokeragesolutionsinc.com
Website: www.brokeragesolutionsinc.com
Telephone: 319-393-9410

Length of Time in the Disability Insurance Industry: 35 years +


Speakers Fee: Sometimes

Travel Expenses: Airfare

Are you approved for CE in any states? Yes

Bart Spencer
Allegis Advisor Group - Director - Disability & Long Term Care

Address: South Jordan, UT
Email: bart.spencer@allegisag.com
Website: www.allegisag.com
Telephone: 801-644-2278

Length of Time in the Disability Insurance Industry: 10-20 years

Areas of expertise within the Disability Insurance Industry: Individual, BOE, Loan Protection; Buy Sell; Key Person


Speakers Fee: No - Donation Only

Travel Expenses: Airfare, Ground Transportation, Accommodations, Meals and Incidental Expenses

Are you approved for CE in any states? Yes, Utah
Speakers Bureau Disclaimer

The IDIS assumes no responsibility for Speakers or consequences resulting from the use of information or content of such information presented, including (but not limited to) errors or omissions, the accuracy or reasonableness of factual or scientific assumptions, studies or conclusions, the defamatory nature of statements, ownership of copyright or other intellectual property rights, and the violation of property, privacy, or personal rights of others. The IDIS is not responsible for, and expressly disclaims all liability for, damages of any kind arising out of use, reference to, or reliance on such information. While the speaker makes every effort to present accurate and reliable information, the IDIS does not endorse, approve, or certify such information, nor does it guarantee the accuracy, completeness, efficacy, timeliness, or correct sequencing of such information. All presentations represent the opinions of the presenter and do not represent the position or the opinion of the IDIS or its members.