

# TOM HEGNA

CLU, ChFC, CASL

KEYNOTE SPEAKER

ECONOMIST

AUTHOR

RETIREMENT EXPERT

## MEDIA KIT



TomHegna  
.com



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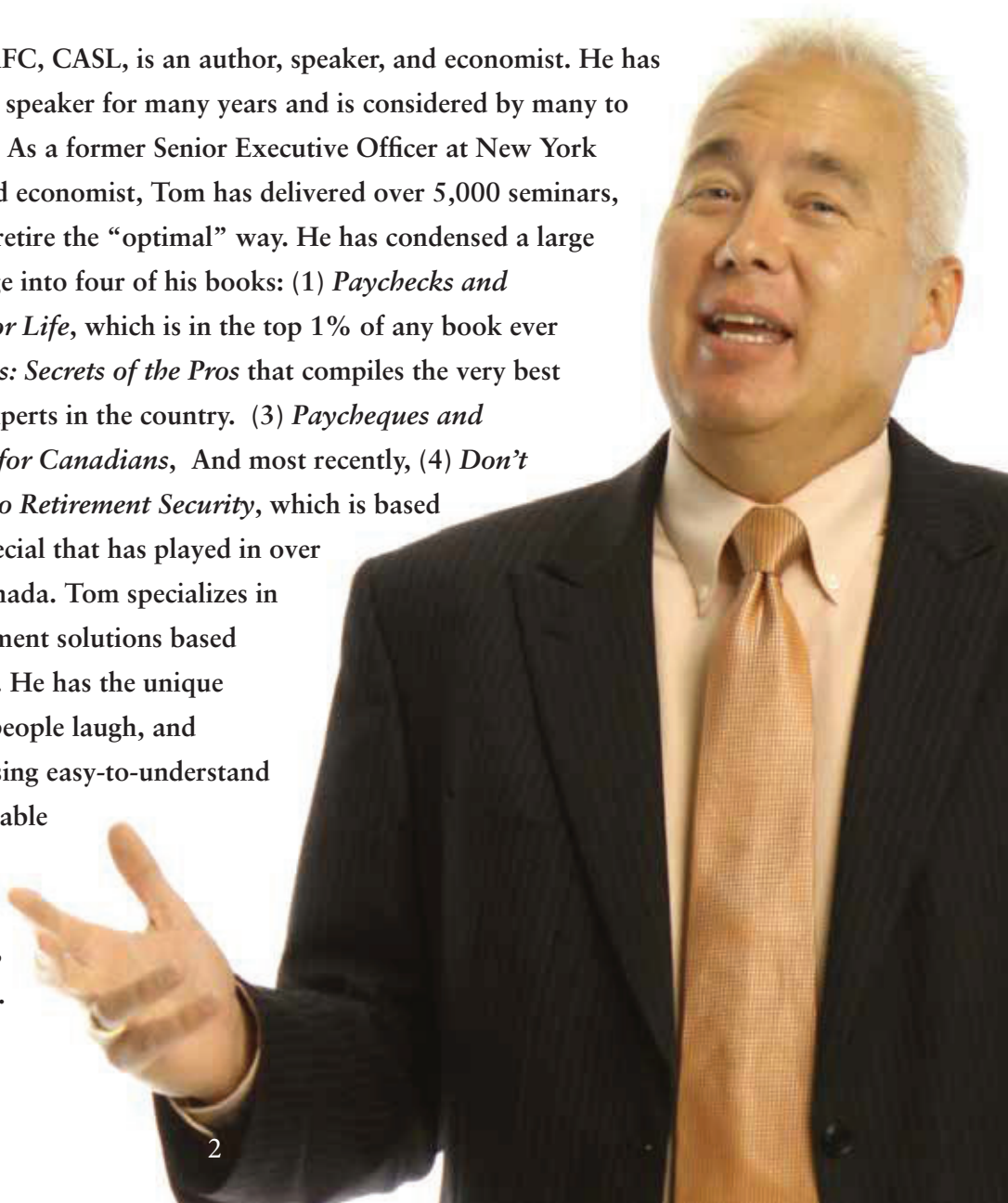
**P:** 1-855-Tom-Hegna (866-4346)

**W:** [www.TomHegna.com](http://www.TomHegna.com)

**E:** [Support@TomHegna.com](mailto:Support@TomHegna.com)

## BIOGRAPHY

**TOM HEGNA** CLU, ChFC, CASL, is an author, speaker, and economist. He has been an incredibly popular industry speaker for many years and is considered by many to be THE Retirement Income Expert! As a former Senior Executive Officer at New York Life, retired Lieutenant Colonel, and economist, Tom has delivered over 5,000 seminars, helping Baby Boomers and seniors retire the “optimal” way. He has condensed a large chunk of his considerable knowledge into four of his books: (1) *Paychecks and Playchecks: Retirement Solutions for Life*, which is in the top 1% of any book ever sold, (2) *Retirement Income Masters: Secrets of the Pros* that compiles the very best practices from the top retirement experts in the country. (3) *Paycheques and Playcheques, Retirement Solutions for Canadians*, And most recently, (4) *Don't Worry, Retire Happy! Seven Steps to Retirement Security*, which is based on his popular Public Television Special that has played in over 72 million homes in the US and Canada. Tom specializes in creating simple and powerful retirement solutions based on math and science – not opinions. He has the unique ability to pump up a crowd, make people laugh, and solve complex financial problems using easy-to-understand words, ideas and stories. He is available to speak to businesses, government organizations, professional associations, financial professionals, and their clients all across the globe.





# BACKGROUND & CREDENTIALS

## RETIREMENT EXPERT

Tom grew up in a small town in Minnesota. He attended North Dakota State University on an Army ROTC Scholarship, served as the Cadet Battalion Commander and graduated with honors earning 3 majors in 4 years. After serving 6 years, on Active Duty in the US and Europe, Tom started his career in the insurance business with MetLife. He spent 8 years there as a top agent, Manager and National Marketing Manager. He spent 15 years with New York Life and was responsible for driving their Retirement Income Initiative. Tom trained every New York Life Agent, Manager and Wholesaler. New York Life continues to dominate the Retirement Income market with a 42% Market Share – unheard of in the Insurance Industry where there are hundreds of companies. Sales increased from \$100,000 to over \$4 Billion. Tom also remained in the US Army Reserves spending another 16 ½ years leading Counter Terrorism Operations in the Pacific Theatre. He retired in 2006 as a Lieutenant Colonel.

In 2011, Tom retired from New York Life to dedicate himself full-time to speaking, training, and consulting with financial advisors on how to best optimize client portfolios and provide retirement solutions for life.

By 2013, Tom qualified for the Elite “Million Dollar Speakers Group” of the National Speakers Association (NSA). This is the top ½ of 1% of Professional speakers in the world.

Below are some of the companies and organizations from around the world that Tom has presented to:



# PAST SPEAKING ENGAGEMENTS



## PAST ENGAGEMENTS

Being described by many as a “road warrior,” Tom spends roughly 200 days out of the year traveling, coast to coast, border to border, and has even presented main platform in numerous countries and continents all over the globe! There is no professional speaker in America who speaks more than Tom. On average, you can find him lighting up the stage in front of thousands every month, sharing his optimal retirement message with CPAs, attorneys, managers, agents, and their clients as well. With over 5,000 seminars under his belt, there’s no slowing him down!

Here are some of Tom’s Main Events:

2009 Top of the Table MDRT - Main Platform  
 2010 MDRT Annual Meeting - Main Platform  
 2010 NAIFA Annual Meeting - Main Platform  
 2011 MDRT Experience Singapore - Main Platform  
 2011 MDRT Growth Summit  
 2012 MDRT Connexion Zone  
 2013 GAMA/LAMP Annual Meeting - Main Platform  
 2013 MDRT Day Taiwan - Main Platform  
 2013 MDRT Annual Meeting  
 2013 NAIFA Annual Meeting - Main Platform  
 2014 NAFIC Annual Meeting - Main Platform  
 2014 Public Television Special - Don’t Worry Retire Happy!  
 2015 WIFS Annual Meeting - Main Platform  
 2015 NAIFA Annual Meeting - Main Platform  
 2016 GAMA/LAMP Annual Meeting  
 2016 MDRT Annual Meeting (Spoke Twice)  
 2018 MDRT Experience Bangkok - Main Platform

Also, Tom did the five Boomeretirement Roadshows, SFSP, AALU, Numerous State NAIFA Conventions, and over 40 Main Platform Council Presentations for New York Life.

Member of the Elite “Million Dollar Speakers Group” of the National Speakers Association (NSA).





# SPEAKER OPPORTUNITIES



## FUTURE SPEAKING OPPORTUNITIES

Focused on providing value to companies, managers and financial advisors. Tom has had a multi-billion dollar impact on the insurance industry and he can have a multi-million dollar impact on your operation. He is available for high-impact training sessions as well as client seminars. He shows in very simple terms why people **MUST** use insurance products to remove specific retirement risks. He shows how this is based in math and science - **NOT** opinions. Book Tom for your event today!

A true “field guy” who gets what advisors and their clients need. He has trained over 300,000 financial advisors and given over 5,000 training sessions and seminars. Tom delivers phenomenal, motivational, and educational presentations that drive people to action!

## KEYNOTES TITLES:

- Don't Worry, Retire Happy! Seven Steps to Retirement Security (as seen on TV)
- Retirement Alpha: How Mortality Credits Improve Retirement Outcomes
- Paychecks and Playchecks
- Social Security Optimization
- Paycheques and Playcheques: Retirement Income Solutions for Canadians

## WORKSHOPS:

- Client Objections and How to Handle Them
- Life Insurance: Understanding Human Capital and Life Insurance in Retirement
- 20/20/20 Table Talk Case Study Session
- Social Security Case Studies

Fees: \$15,000 - \$20,000  
Plus Reasonable Travel and Expenses.

Looking for more details?  
Contact us at 1-855-TOM-HEGNA!  
(866-4346)

# WHAT DOES THE INDUSTRY SAY ABOUT TOM

## IN THE INDUSTRY

Tom Curry - Past President NAIFA

*"Tom is an 'edge of your seat' kind of speaker. You'll fill a note pad so come prepared! Highest recommendation!"*

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John Baier - Past President of GAMA

*"Tom's genius is taking the most complex concepts and putting them into simple and memorable terms. His conviction and passion for these principles, not only educate people, but more importantly, inspire them to act."*

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Terry Headley - Past President NAIFA

*"Thank you for your tremendous main stage presentation - the content and passionate delivery were beyond compare - you hit a grand slam with our attendees - the evaluations rated you as the top speaker ever!"*

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Jeff Taggart - Past President NAIFA

*"Few people have a multi-billion dollar impact on a company or an industry. Tom is one of those people. Tom has an unbridled passion for retirement income. This passion is contagious and motivates agents to action. His ideas are simple, yet sophisticated. He resonates with the newest agents and most experienced agents alike. Very few people have the ability to light up a room like Tom does."*

**TOMHEGNA.com**

RETIREMENT SOLUTIONS FOR LIFE

**PAYCHECKS  
AND PLAYCHECKS.com**

RETIREMENT SOLUTIONS FOR LIFE

**PAYCHEQUES  
AND PLAYCHEQUES.ca**

RETIREMENT SOLUTIONS FOR CANADIANS



DON'T WORRY,  
**RETIRE  
HAPPY**



**TomHegna**  
.com **TH**

# WHAT DOES THE INDUSTRY SAY ABOUT TOM

## IN THE INDUSTRY

Phil Harriman - Past President MDRT

*"Tom Hegna is one of those unique thinkers in the financial planning profession today. He takes the complex and makes it understandable. He takes the psychology of how people make financial decisions to motivate them to take action. His wit wisdom and integrity penetrates whether it's with a room of dozens or thousands. If you have the chance to hear Tom Hegna drop what you are doing, I know first hand it will be worth every minute."*

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Julian Good - Past President, MDRT

*"Tom Hegna's ability to communicate the principles and uses of annuities is simply unmatched in our profession today. His concepts are sticky and immediately transferable to any financial services practice."*

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Kyle Schlichenmayer -  
NYLIFE Securities LLC

*"Tom's Presentation at the Montana NAIFA convention in Great Falls a couple years ago was a huge influence and a game changer for me. If it wasn't for that, there's a decent chance I'm not here today! Thank you for everything that YOU do!"*

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# SOCIAL MEDIA OUTREACH



Tom Hegna

## SOCIAL MEDIA ANALYTICS



Facebook: [Facebook.com/TomHegnaSpeaks/](https://Facebook.com/TomHegnaSpeaks/)



14,439 Page Likes



11,135 Average Organic Post Reach



250,000 + Post Reactions and Likes



Twitter: [Twitter.com/TomHegnaSpeaks](https://Twitter.com/TomHegnaSpeaks)



1,981 Followers



134,000 impressions in the last 90 days



3,522 profile visits in the last 90 days



LinkedIn: [LinkedIn.com/In/Tom-Hegna-33683a40](https://LinkedIn.com/In/Tom-Hegna-33683a40)



16,300+ Connections



All-Star Level Profile



99+ Skills and Endorsements



# TOM HEGNA

## VIRTUAL OUTREACH

•SPEAKER •AUTHOR •ECONOMIST

•RETIREMENT EXPERT



Being a Baby Boomer himself, Tom doesn't just talk the talk about retirement planning—he walks the walk! As he transitions into his own retirement phases, he plans to spend more time with family, spend time doing the things he loves like golfing and skiing, and spending less time on the road. He will be doing fewer LIVE events and more virtual events. He has a full training and coaching site online as well. He will continue to contribute content to financial professionals all over the world, and he wants to help YOU convert your prospects into clients. To do so, Tom offers a variety of virtual services. Whether you're looking to recruit new financial professionals, train your current team, or show some client appreciation, Tom's message will help.

## PRESENTATION TOPICS

- Don't Worry, Retire Happy! Seven Steps to Retirement Security (as seen on PBS)
- Retirement Alpha: How Mortality Credits Improve Retirement Outcomes
- Paychecks and Playchecks
- Social Security Optimization
- Paycheques and Playcheques: Retirement Income Solutions for Canadians
- Powerful Life Insurance Concepts and Strategies
- Client Objections and How to Handle Them
- Seminar Selling
- Financial Wellness

## SERVICES OFFERED

### -Webinars

Tom can deliver powerful content to financial professionals or clients and prospects.

Fee: \$8,000

### -Podcast, Radio, and Television

Invite Tom to be a guest on your podcast, radio broadcast, or television show.

Fee: \$1,000 - \$3,000

### -Cameos

Get a one-to-two minute video for your website or social media channel where Tom talks about what you do.

Fee: \$500

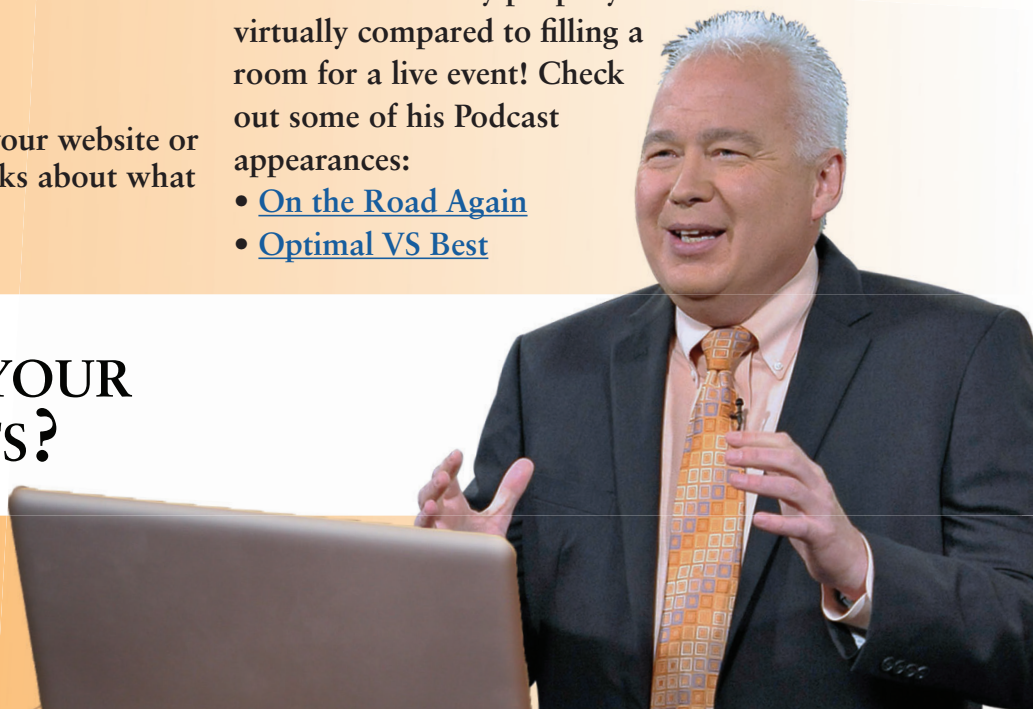
## PAST ENGAGEMENTS

Tom has appeared on various virtual platforms including webinars, podcasts, YouTube, social media channels, and radio shows. His "Don't Worry, Retire Happy!" PBS TV Special played in over 80-million homes in the U.S. and Canada! Just think of how many people you can have attend virtually compared to filling a room for a live event! Check out some of his Podcast appearances:

- [On the Road Again](#)
- [Optimal VS Best](#)

## READY TO BOOK YOUR VIRTUAL EVENTS?

1-855-TOM-HEGNA  
[support@tomhegna.com](mailto:support@tomhegna.com)





# TRAINING COACHING CLIENT EDUCATION

## INTERACTIVE ONLINE TRAINING AND COACHING FOR FINANCIAL PROFESSIONALS

Start each day by expanding your mind, staying motivated, and sharpening your skills. Tom has made it fast and easy to have the best information at the tip of your fingertips!

Tom Hegna On Demand's Training, Coaching, and Client Education will set you up for success to be a top advisor in our industry, all for only \$97 a month.



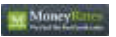
**\$97**  
/MONTH

Visit [www.TomHegna.com/THOD](http://www.TomHegna.com/THOD) to sign up for your Interactive Online Training And Coaching: Tom Hegna On Demand!



# FEATURED ARTICLES & MEDIA

## TOM HAS BEEN FEATURED IN:



## FEATURED ARTICLES:

Fox Business -

[\*Should Annuities Provide Your Retirement Paycheck?\*](#)

Excerpt:

“With traditional safety nets such as company pensions and Social Security dwindling, many of the 78 million baby boomers are left trying to answer one question: ‘Who’s going to pay my retirement paycheck?’

Annuities are one investment that more and more prospective retirees are considering. These financial products are created by the insurance industry, and offer a lot more flexibility and advantages than other investments.”

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Forbes -

[\*6 Reasons to Consider Buying Longevity Insurance\*](#)

Excerpt:

“Over the last few years, annuities have begun to take a more prominent role in the retirement income planning process and part of the reason is longevity risk. According to retirement expert Tom Hegna, CLU®, ChFC®, CASL®, author of Pay Checks and Play Checks, ‘math and science demands that in order to have a successful retirement, you must take longevity risk off the table. Stocks, bonds, CDs, and Real Estate CANNOT take longevity risk off the table. Only some form of guaranteed lifetime income can do it – Social Security, Pension, or lifetime income annuity.’”

# FEATURED ARTICLES & MEDIA

## FEATURED ARTICLES

### GAMA International Journal - [\*Don't Worry, Retire Happy!\*](#)

#### Excerpt:

“As the world’s economy advances into an age of technology and unpredictable challenges, the vast majority of Americans face an uphill battle when planning for retirement. As financial professionals, we display our intrinsic values to our clients by helping them along that arduous journey. I can say from personal experience that it isn’t always easy. But as managers, it is our obligation to train our advisors to help as many of the 78 million baby boomers as we can.”

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### NAFA Annuity Outlook - [\*Helping Your Client’s Plan for an Optimal Retirement by Preparing for the Impact of Taxes\*](#)

#### Excerpt:

“Two subjects that are widely covered when discussing the accumulation phase in retirement are: Portfolio diversification within your retirement plan and the importance of saving early and often. Once people enter the distribution phase in retirement, guaranteed lifetime income, risk management, and managing lifestyle habits become the more popular discussions. If there is one thing I emphasize to all retirees, it’s that retirement is not about your assets; it’s all about income and I would argue guaranteed lifetime income is just that! One key part of retirement planning that is often forgotten, whether it is in the accumulation or distribution phase, is understanding the taxation of your accounts and policies.”



# FEATURED ARTICLES & MEDIA

## FEATURED ARTICLES

Life Health Pro -

[\*Don't Leave Your Children Any Money\*](#)

Excerpt:

“As 78 million baby boomers are marching headlong and headstrong into retirement, many of them are discussing how much money to leave their kids. As the millennial generation moves out of the house and into the real world (at least for a few months!), many boomers are looking to leave a little something to their kids or grandkids. Like Mark Twain says, ‘Thrift is a wonderful virtue, particularly in an ancestor.’ Estate planning is all about transferring your wealth and assets to your family (or favorite charity) in the most tax-efficient manner possible. My advice to clients: Do not leave your kids or grandkids any money. I repeat, do NOT leave your kids or grandkids any money! Leave them LIFE INSURANCE because you can leave them so much more for so much less!”

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The American College of Financial Services -

[\*Family Matters: Providing Answers for Times like These\*](#)

Excerpt:

“It has been more than 30 years since the song ‘We Are Family’ reached No. 1 on the charts, but the sentiment still rings true. In the age of volatile markets and diminishing corporate and government benefits, it has never been more important for families to come together and care for each other. As a financial professional, you must help your clients put a plan in place to provide for their loved ones. The products you offer have the answers to help them thrive, regardless of the challenges they may encounter. Currently, 78 million baby boomers are heading into retirement. They may not know that they face numerous risks to themselves and their families, including: Market risk, inflation risk, deflation risk, long-term care risk, and order of returns risk.”



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