

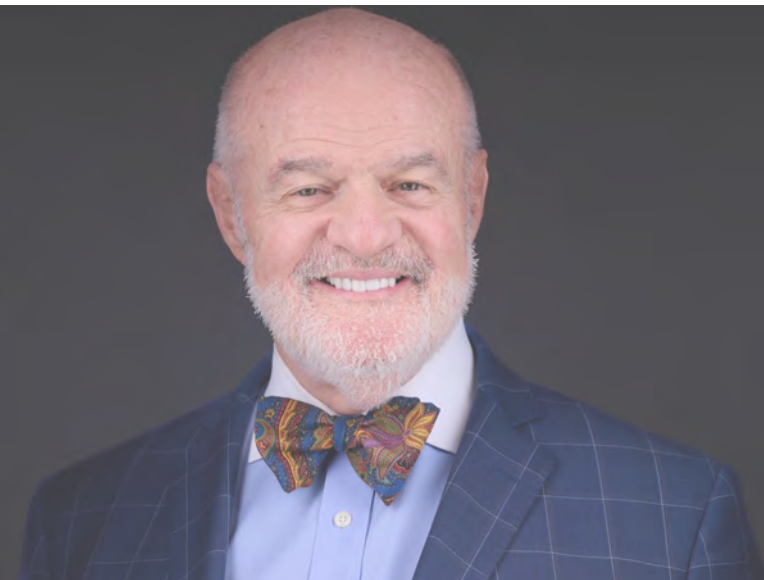


JOSEPH W. JORDAN



JOSEPHJORDAN.COM

HUNDREDS OF
PRESENTATIONS TO
OVER 400,000 FINANCIAL
PROFESSIONALS IN 28
COUNTRIES AROUND
THE WORLD



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JOE JORDAN INDUCTED IN THE FINANCIAL HALL OF FAME



Induction Ceremony



Joe's Speech

Joe Jordan was formally inducted as a Laureate of the Financial Hall of Fame and recipient of the Builders Award during their 2025 inaugural ceremony in Victoria, BC, Canada. Founded by Alphonso Franco, their aim was “to honor the best professionals in the financial services industry, including insurance, investment, and other financial disciplines, who have devoted their lives to advancing their professions to new heights.”

The inductees were from the US and Canada and included the Canadian Insurance Hall of Fame. There were also awards given for Lifetime Contributions and Lifetime Achievements.

Joe is pictured with Alphonso Franco and acclaimed author Kaplan Mobray, who presented the Builders Award. The award “acknowledges individuals who have played a pivotal role in building and shaping the financial services landscape. Recipients have contributed to the growth and development of the industry through their visionary efforts.”

Joe is also pictured with the stellar group of financial industry luminaries that were inducted into the Financial Hall of Fame. Standing from top left to right: Serge Morel, Mike Morrow, Solomon Hicks, Alphonso, George Goulet, Joe, Patrick McEntee, Anthony Longly, and Karl Hartey. Sitting from left to right: Michelle Varas, Tracey Devonport, Pascale Cauchi, Amy Tong, and Diane McCurdy.





Joe Jordan
Speaker/Author



Joe Jordan to receive the 2023 *John Newton Russell Award*, the highest honor accorded by the insurance industry!

Joe Jordan to Receive the 2023 John Newton Russell Memorial Award

NAIFA is proud to announce Joseph W. Jordan, inspirational speaker, behavioral finance expert, best-selling author, and one of the founders of the Insured Retirement Institute (IRI), is the recipient of the 82nd annual *John Newton Russell Memorial Award*. The award is the highest honor accorded by the insurance industry to a living individual who has rendered outstanding services to the institution of life insurance. The selection committee consists of representatives of the nine leading organizations in the life insurance and financial services industry. Jordan will be celebrated and formally presented the award at NAIFA's National Leadership Conference and Belong event in Washington, D.C., on December 4.

"Joe Jordan is a legend in our industry who perfectly represents everything the John Newton Russell Memorial Award stands for. On behalf of the selection committee, I am honored to congratulate Joe as the 2023 award recipient," said Tom Michel, LACP, CLTC, Chair of the 2023 award committee. "As an internationally known speaker and author, Joe has been and continues to be a positive influence on hundreds of thousands of agents and advisors. The committee considered many qualified nominees for the award, but Joe's energy and passion for our industry and ability to motivate and inspire his fellow financial professionals make him a worthy choice."

See Accolades From Joe's Colleagues!

Tom Hegna congratulates Joe Jordan for receiving the 2023 John Newton Russell Award!



Jack Keane, Retired Four-Star General, congratulates Joe Jordan for receiving the 2023 John Newton Russell Award!



Click on image above to view video.



PRESENTATION OVERVIEW

JOE JORDAN BRINGS THE FINANCIAL SERVICES BUSINESS FROM THE HEAD TO THE HEART.

In the face of unprecedented change in technology, regulation and demographics, Joe Jordan reveals why there is no better time to be in financial services. His call to action is to get back to basics: Create trust and relationships with clients and make a commitment to daily prospecting.

The financial services business is built on two pillars: **Prospecting** and *everything else*. When advisors truly understand and believe in their significant impact—providing financial independence, dignity and a legacy to others—they can conquer their fears, overcome rejection and continue prospecting.

Joe doesn't deliver your standard financial services presentation! It's emotional, uses storytelling and videos, and equips advisors with the tools they need to thrive in today's **golden age of advice**.

“YOUR UNIQUE PURPOSE IS TO MAKE CERTAIN
THAT THE MONEY OUTLIVES THE PEOPLE.”

THE BEST USE OF JOE

- 🏛 *Year End or Kick Off Meetings*
- 🏛 *Recruiting Seminars for New and Prospective Advisors*
- 🏛 *Client Education Events To Reinforce the Importance of Planning and having an Advisor*
- 🏛 *Combination of Advisor Meetings and Client Seminars*





SPEAKING ENGAGEMENTS

PARTIAL LIST OF CLIENTS & KEYNOTES



THE AMERICAN COLLEGE KNOWLEDGE SUMMIT

MONEY MARKETING RETIREMENT SUMMIT, MONTE CARLO

MEGA CONFERENCE, MALAYSIA

MDRT EXPERIENCE IN SEOUL, KOREA

ASIAN PACIFIC LIFE CONFERENCE IN BANGKOK, THAILAND

CONFERENCE FOR AFRICAN AMERICAN FINANCIAL PROFESSIONALS

MDRT EXPERIENCE IN BANGKOK, THAILAND

MDRT MAIN PLATFORM

AGEAS CONFERENCE IN HO CHI MINH CITY, VIETNAM

MANULIFE FINANCIAL MEETING IN BANGKOK, THAILAND

LIMRA BRAZIL

MDRT EXPERIENCE INDIA

OVER 40 REGIONAL NAIFA AND FPA MEETINGS

KEYNOTE SPEAKER AT THE LIMRA

DISTRIBUTION CONFERENCE, HONG KONG

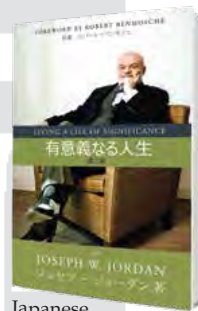
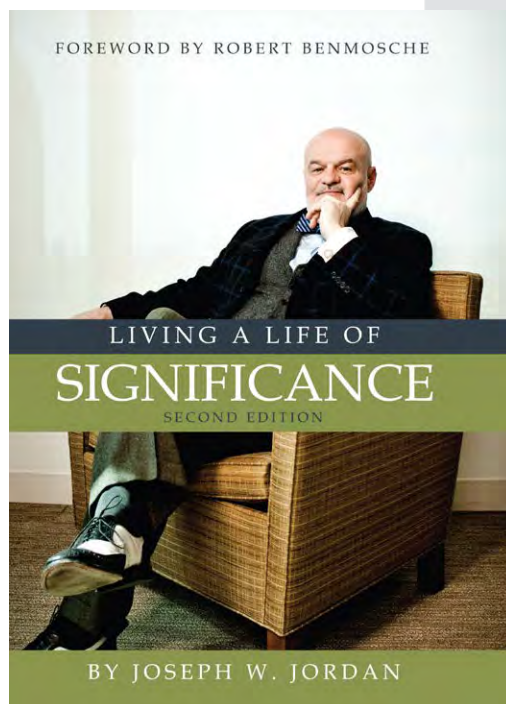
CHAIRMAN OF THE PFS CONFERENCE IN BIRMINGHAM, UK

GAMA LAMP (FOUR TIMES)

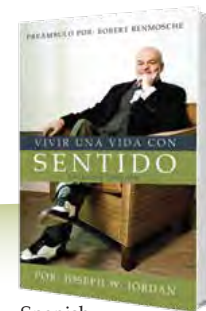
In addition to the events listed above, Joe has spoken to hundreds of other financial service and insurance organizations around the world.

THE BESTSELLING BOOK *LIVING A LIFE OF SIGNIFICANCE*

OVER **150,000** COPIES SOLD
NOW TRANSLATED IN **FIVE** LANGUAGES



Japanese



Spanish



Chinese



Portuguese

“THIS BOOK IS A MUST READ. ALL ORGANIZATIONS AND INDIVIDUALS MUST HAVE STRONG VALUES. JOE JORDAN FOCUSES ON THESE VALUES. ALTHOUGH HE TALKS ABOUT FINANCIAL SERVICES, HE IS REALLY TALKING ABOUT LIFE.”

– **JACK KEANE**

**RETIRED FOUR-STAR GENERAL & FORMER VICE CHIEF OF STAFF
OF THE U.S. ARMY**

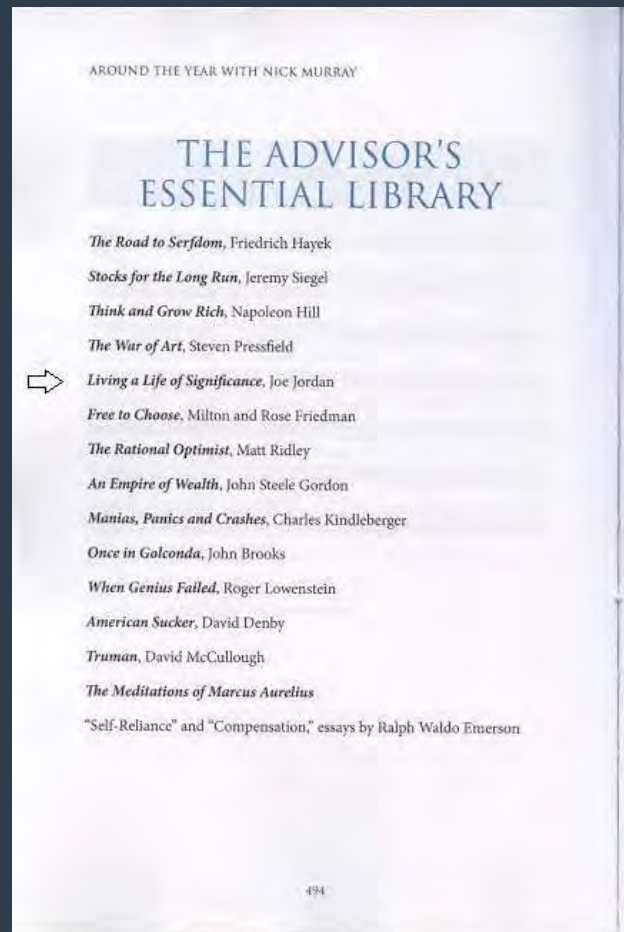
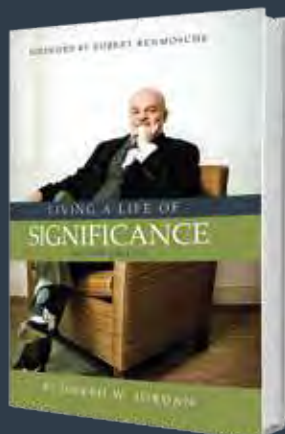
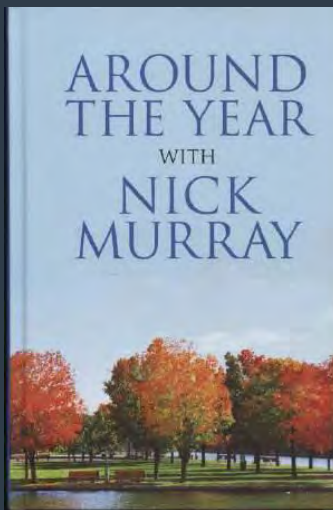
–**NICK MURRAY**, ONE OF THE INDUSTRY’S PREMIER AUTHORS AND SPEAKERS, INCLUDED *LIVING A LIFE OF SIGNIFICANCE* IN HIS ADVISOR’S ESSENTIAL LIBRARY.



Living a Life of Significance included in Nick Murray's The Advisor's Essential Library

A Rare Endorsement From Nick Murray,
the Father of Financial Planning

I am so honored that Nick included my
book in his book, among these other
distinguished authors. See the picture
below and check out the company I'm
in!



THE POWER OF STORYTELLING

Family Members Can Be Difficult To Approach

August 17, 2018 | Joseph Jordan



Becoming More Than An Actress

September 12, 2018 | Joseph Jordan

Imagine what Jane March would do if there were consequences to not doing this. This is a great story to get inspired to members.

After narrowly escaping the Killing Fields of Cambodia, Nancy and Brian Sovani were incredibly fortunate to be in the States, where they started a new life together.

Little did they know, the life they built for themselves in the States was threatened once again years later.

Listen to Nancy tell her personal story about her experience with her agent, Jo Ann Merrill-Craves.

"Thank you, Living Benefits."

Joelma's Story Is Why You Must Prospect With Everyone

September 19, 2018 | Joseph Jordan



Joelma Diaz wasn't convinced she was hearing a smoke.

During a fun night of hanging out with her friends at church, the right side of her body suddenly began to feel weak.

Disability Insurance: A Critical Conversation With Small Business Owners

September 25, 2018 | Joseph Jordan

Much of the discussion about business planning centers around succession planning, usually using life insurance.

One product that has been habitually undersold is disability income insurance.

See how George Reilly benefited his friend and client business owner.



"Like a Light in the Dark"

August 17, 2018 | Joseph Jordan

Take a minute out to listen to this great video from Alliance Group, a pioneer in living benefits. It's a powerful story about the impact we can have on clients.



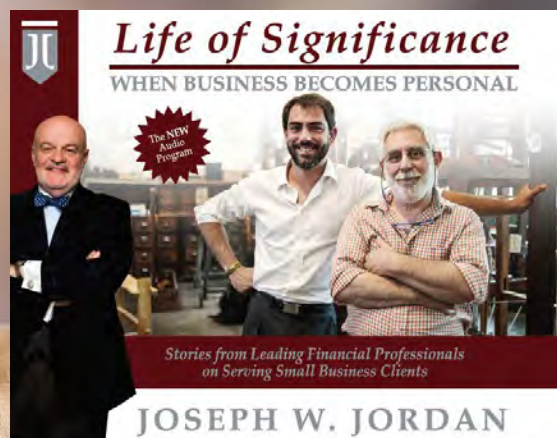
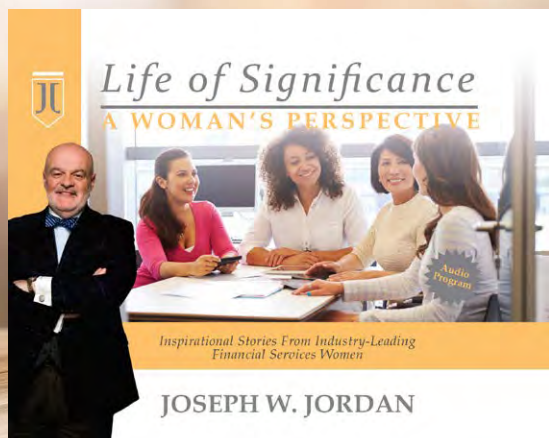
Brutally attacked at her place of employment as she pulled into work one Monday morning, Holly Hernandez Pages was doused in gasoline and set on fire. The attack left her with severe burns covering the majority of her body. Holly's miraculous road to recovery would prove to be a rocky one, requiring multiple graft surgeries and occupational therapy to regain full mobility. She was unable to work while in the hospital, and her income

We need to revive the lost art or storytelling. Statistics don't inspire people to action—stories do.

At each seminar, Joe offers attendees a free monthly email newsletter that provides a new video story every month.



LIFE OF SIGNIFICANCE AUDIO PROGRAMS



LEARN THE **ART** OF THE BUSINESS
FROM CLIENT STORIES TOLD BY **TOP ADVISORS**

"I KEEP THINKING BACK THAT IF HE HAD LONG-TERM-CARE INSURANCE, WHICH I HAD ASKED HIM ABOUT YEARS AGO, WOULD WE HAVE HAD MORE LUCK BRINGING SOMEONE ELSE INTO THE HOUSE? I KNOW THERE WOULD HAVE BEEN SO MUCH LESS STRESS."

— **ROBYN LEWIS OGLESBY**

FROM THE A WOMAN'S PERSPECTIVE PROGRAM

THESE AUDIO PROGRAMS (CD & MP3) FEATURE 24 SHORT STORIES TOLD BY TOP FINANCIAL PROFESSIONALS ABOUT THEIR IMPACT ON CLIENTS. THE BUSINESS PROGRAM GIVES REPS STORIES AND COURAGE TO ENTER THE LUCRATIVE SMALL BUSINESS MARKET. THE WOMEN'S PROGRAM PROMOTES THE FEMINIZATION OF THE BUSINESS. WOMEN EXCEL AT CREATING TRUST AND RELATIONSHIPS.

FOUR UNIQUE ASPECTS OF JOE JORDAN'S PRESENTATION

1 THE DAILY CONTACT COMMITMENT

Joe helps advisors understand their true purpose, then calls for a daily commitment to prospecting. This means that a day doesn't go by where an advisor doesn't ask prospects to see them. The difference with this approach is that it's managing the effort—not the results.



2 THE POWER OF STORYTELLING

Stories are critical for building trust and relationships with clients. This is something that no robo advisor can ever do. Joe uses impactful stories in his presentations and shows advisors why they need to use storytelling in their own practice. He shares free monthly stories after the event to help build their storytelling skills.

3 AN ADVOCATE OF DIVERSITY

Joe is an advocate for women in financial services. Women build trust and relationships instinctively. His book has been translated into five languages. He also believes that millennials are a great fit for this business, given that "meaningful work" is a top career requirement for them.

4 A UNIVERSAL MESSAGE

Everyone wants to live a life of significance. Everyone wants real human connections and to know that what they do matters. Having presented to 400,000 financial professionals in 28 countries, Joe's presentations hit this theme head on and transcends cultural, ethnic, gender, work role, and other life differences.



ABOUT JOSEPH JORDAN

Joe Jordan, inspirational speaker and behavioral finance expert, is the author of the award-winning book "Living a Life of Significance" (Acanthus Publishing, 2013). The book sold over 150,000 copies in five languages.

Formerly, Joe ran insurance sales at Paine Webber and more recently was a senior vice president at MetLife.

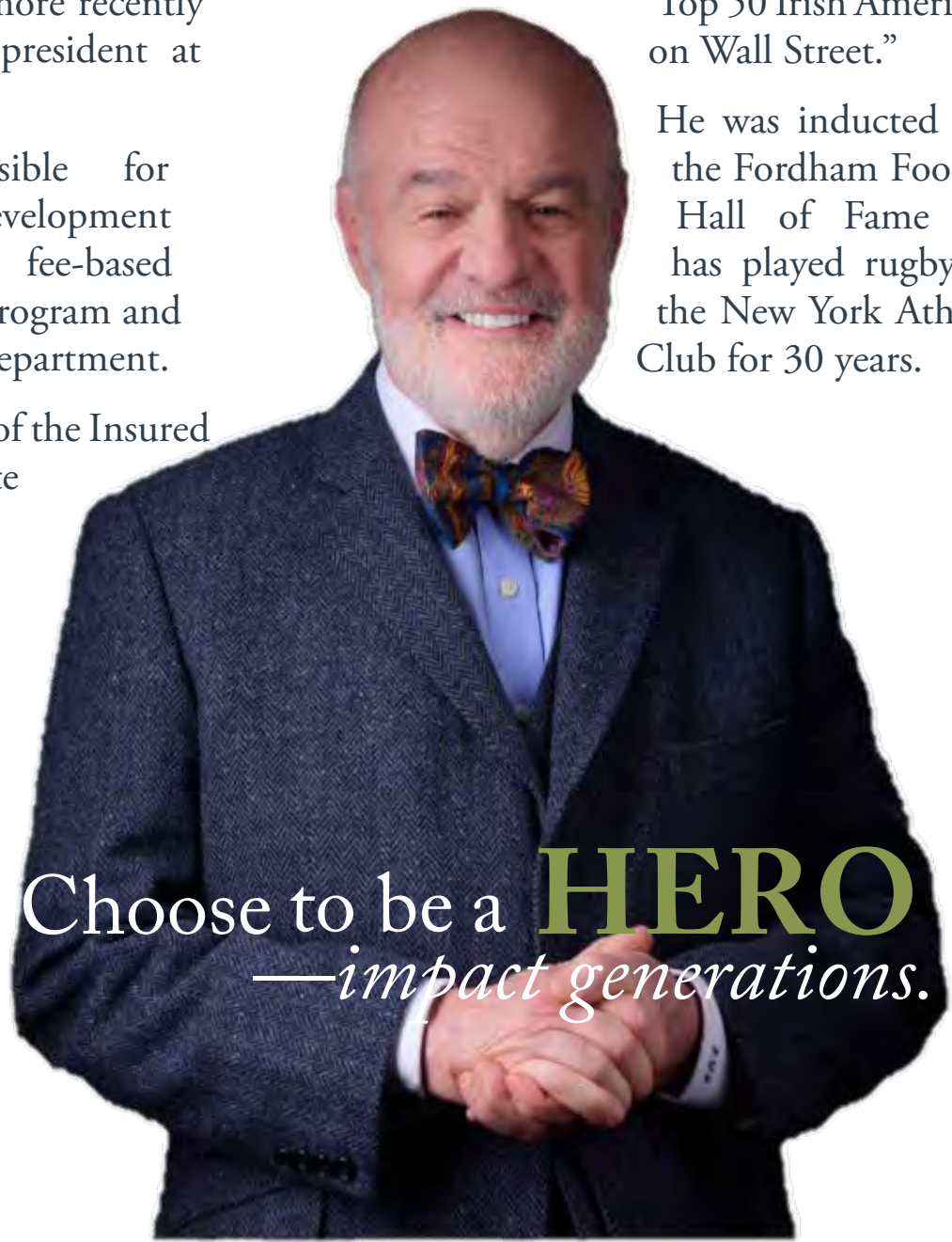
He was responsible for retail product development and started their fee-based financial planning program and behavioral finance department.

Joe is also a founder of the Insured Retirement Institute (formally known

as the National Association of Variable Annuities or NAVA) and has been featured on the cover of Life Insurance Selling magazine.

For three consecutive years, he has been honored by Irish America magazine as one of the "Top 50 Irish Americans on Wall Street."

He was inducted into the Fordham Football Hall of Fame and has played rugby for the New York Athletic Club for 30 years.



Choose to be a **HERO**
—*impact generations.*

TESTIMONIALS

"Joe Jordan is the consummate speaker able to take audiences to higher levels. His simple but intense message resonates with and profoundly moves both new and seasoned [insurance and financial] professionals."

Jesse Slome

Director, American Association for Long-Term Care Insurance

"Living a Life of Significance is essential reading for your practice and your soul."

Nick Murray

"Resources" in Nick Murray Interactive, July 2011

"Joe Jordan's engaging stories will help any advisor to deepen their sense of meaning and purpose. Living a Life of Significance is a gift to any advisor who wants a boost in energy, confidence, and clarity about how their work creates profound positive transformations in countless lives."

Dan Sullivan

Founder of Strategic Coach®

"There are only a small handful of people in this world who go about their everyday life working to make a difference, and Joe is one of them. A Life of Significance is something we all must choose to do, and Joe supplies the motivation."

Gordon Watson,
CEO of AXA Asia

"His message is particularly compelling for women, given his personal and powerful story about his maternal upbringing. He is a true champion for women in the financial services industry."

Angela Ribuffo,
CFP®, RICP®, ChFC® Past President, Women in Insurance and Financial Services, Financial Advisor



"This book is a must-read. All organizations and individuals must have strong values. Joe Jordan focuses on these values. Although he talks about financial services, he is really talking about life."

Jack Keane

Retired Four-Star General & Former Vice Chief of Staff of the U.S. Army

"Joe brings creativity, high energy and humor to a platform like nobody else does."

Jack Turner

Past President, MDRT

"Joe has the raw passion that is rare in the corporate world. That passion is then humanized to bring home the reason for why we do what we do on a daily basis."

Alphonso Franco

Chairman and CEO, The Critical Illness Insurance Centre (Toronto)

"Joe Jordan has that unique combination of passion and experience that only advisors can appreciate. His dedication to our profession comes through so clearly that he motivates you to share with more potential clients what our products do to fulfill dreams and ensure financial dignity."

Philip Harriman

Former MDRT President

"As the co-founder, program director and emcee for the annual Canada Sales Congress in Toronto, I can say without reservation that we have had no better closing speaker for our 1,400 delegates than Joe Jordan."

Jim Ruta

Program Director of the Canada Sales Congress

"In my 20-year association with Joe, I have known him to be passionate, funny, and a great communicator. Especially in this day and age, Joe's message is a constant motivation for sales people to do the right thing always."

Bob Benmosche (deceased)

Former President and CEO, AIG

"Women are in position to excel in this field – an enormous, yet often overlooked, opportunity that Joe has talked about for years. Having spoken around the world and translated his book into five languages, Joe is a great ambassador for this industry, opening its arms to all people regardless of gender, culture or background."

Evelyn Gellar, LUTCF, RICP®, CDEFA®

National Past President, Women in Insurance & Financial Services

"I have never heard a better approach to remind producers why they got in the business and what their responsibilities are to clients."

Harley Gordon

Creator, Certification for Long Term Care (CLTC) Program



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