



JOSEPH W. JORDAN



JOSEPHJORDAN.COM

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

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PHONE: 917-601-3917

EMAIL: [JOE@JOSEPHJORDAN.COM](mailto:JOE@JOSEPHJORDAN.COM)

[JOSEPHJORDAN.COM](http://JOSEPHJORDAN.COM)



# 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**.

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

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### 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

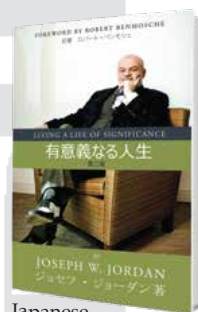
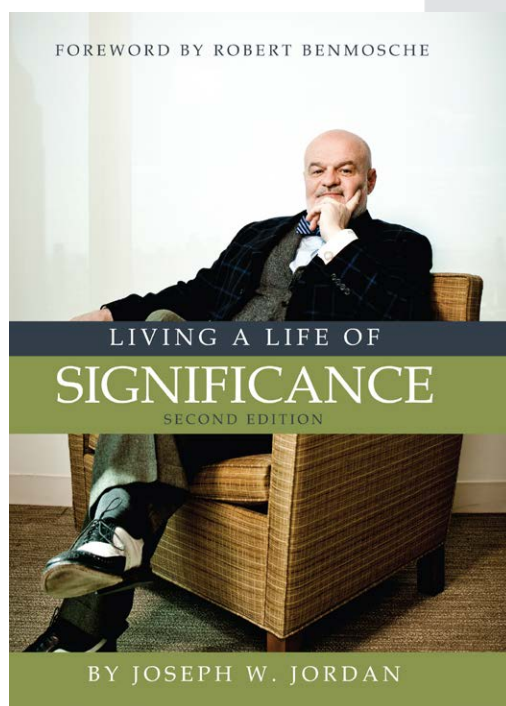
CHAIRMAN OF THE PFS CONFERENCE IN BIRMINGHAM, UK

GAMA LAMP (FOUR TIMES)

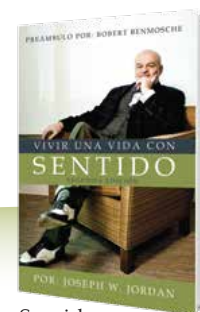
In addition to the events listed above, Joe has spoken to hundreds of other financial service and insurance organizations around the world.

# THE BESTSELLING BOOK *LIVING A LIFE OF SIGNIFICANCE*

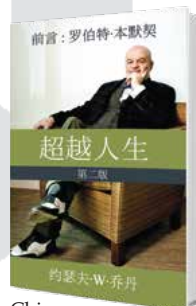
OVER 125,000 COPIES SOLD  
NOW TRANSLATED IN FIVE LANGUAGES



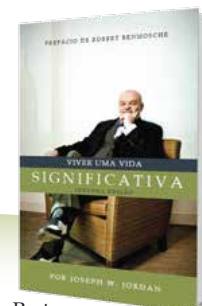
Japanese



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

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

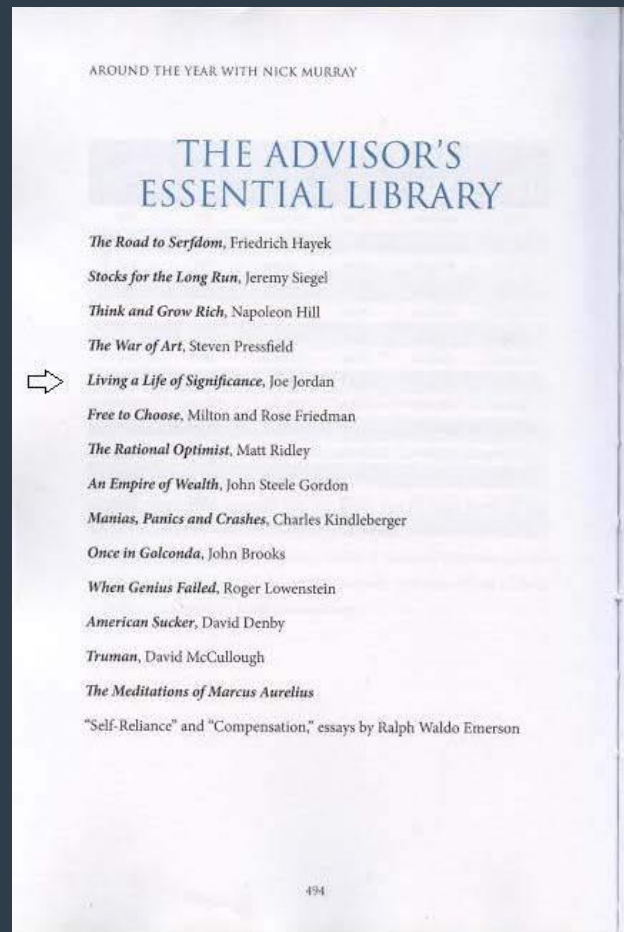
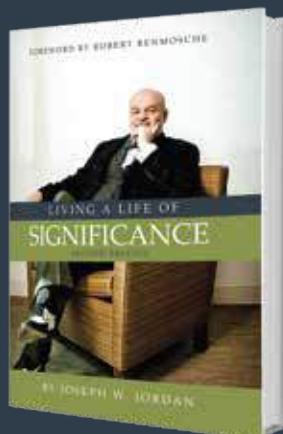
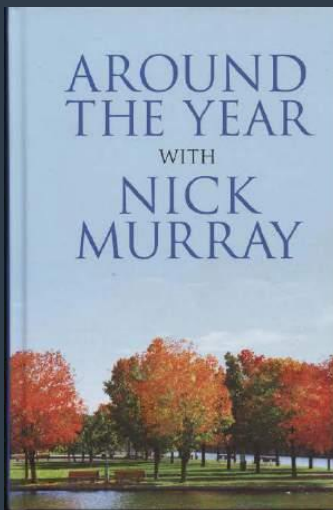
–NICK MURRAY, ONE OF THE INDUSTRY’S PREMIER AUTHORS AND SPEAKERS, INCLUDED *LIVING A LIFE OF SIGNIFICANCE* IN HIS ADVISOR’S ESSENTIAL LIBRARY.



# 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  
Check out this video that all financial advisors need to see



## Becoming More Than An Actress

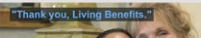
September 12, 2018 | Joseph Jordan

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

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

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

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



## 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.



## Joelma's Story Is Why You Must Prospect With Everyone

September 19, 2018 | Joseph Jordan



Joelma Dias wasn't convinced she was having a stroke. During a fun night of hanging out with her friends at church, the right side of her body suddenly began to feel weak.

## "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.



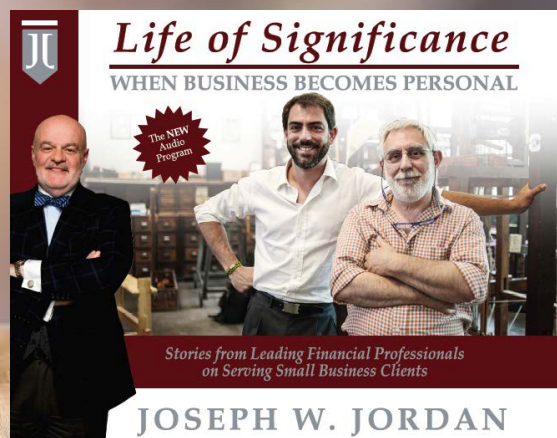
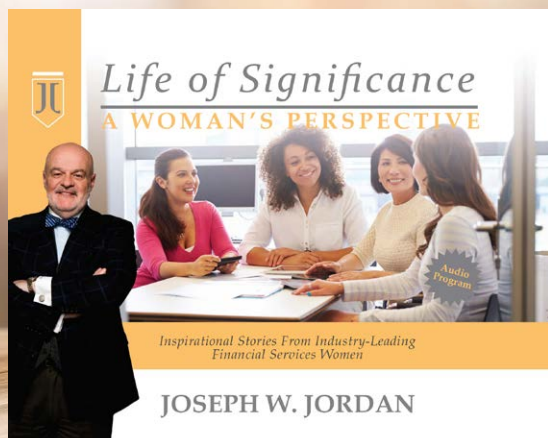
Brutally attacked at her place of employment as she pulled into work one Monday morning, Helynn Hernandez Pages was doused in gasoline and set on fire. The attack left her with severe burns covering the majority of her body. Helynn's miraculous road to recovery would prove to be a costly one, requiring 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



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

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*"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.

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## 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.

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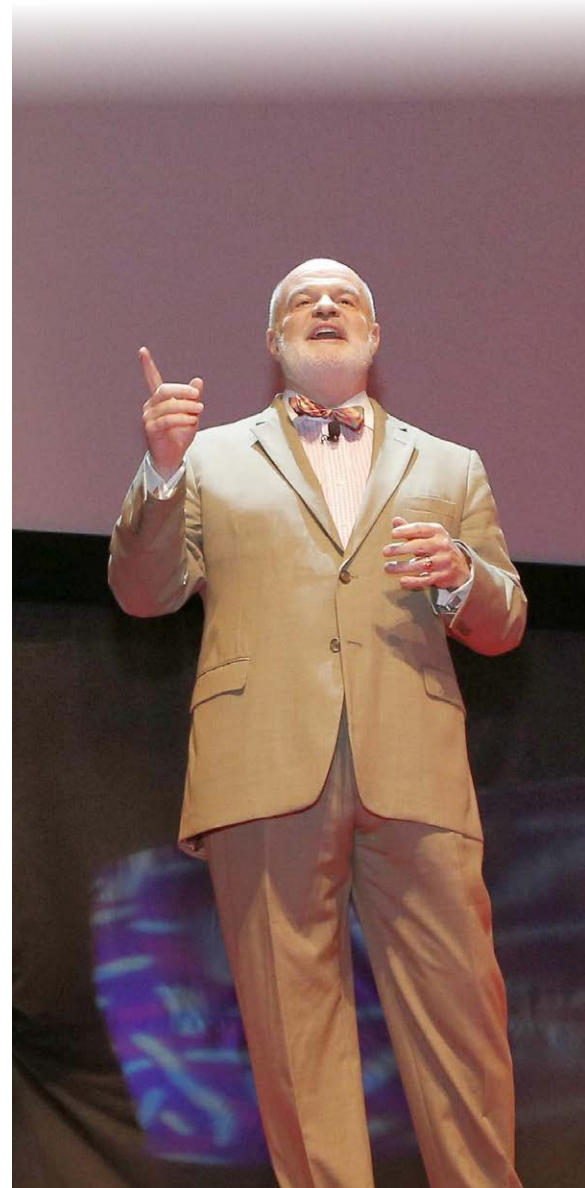
## 3 AN ADVOCATE OF DIVERSITY

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.

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## 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.



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# ABOUT JOSEPH JORDAN

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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 first edition has sold over 125,000 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

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*"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

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

**Nick Murray**

"Resources" in Nick Murray Interactive, July 2011

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*"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®

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*"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."*

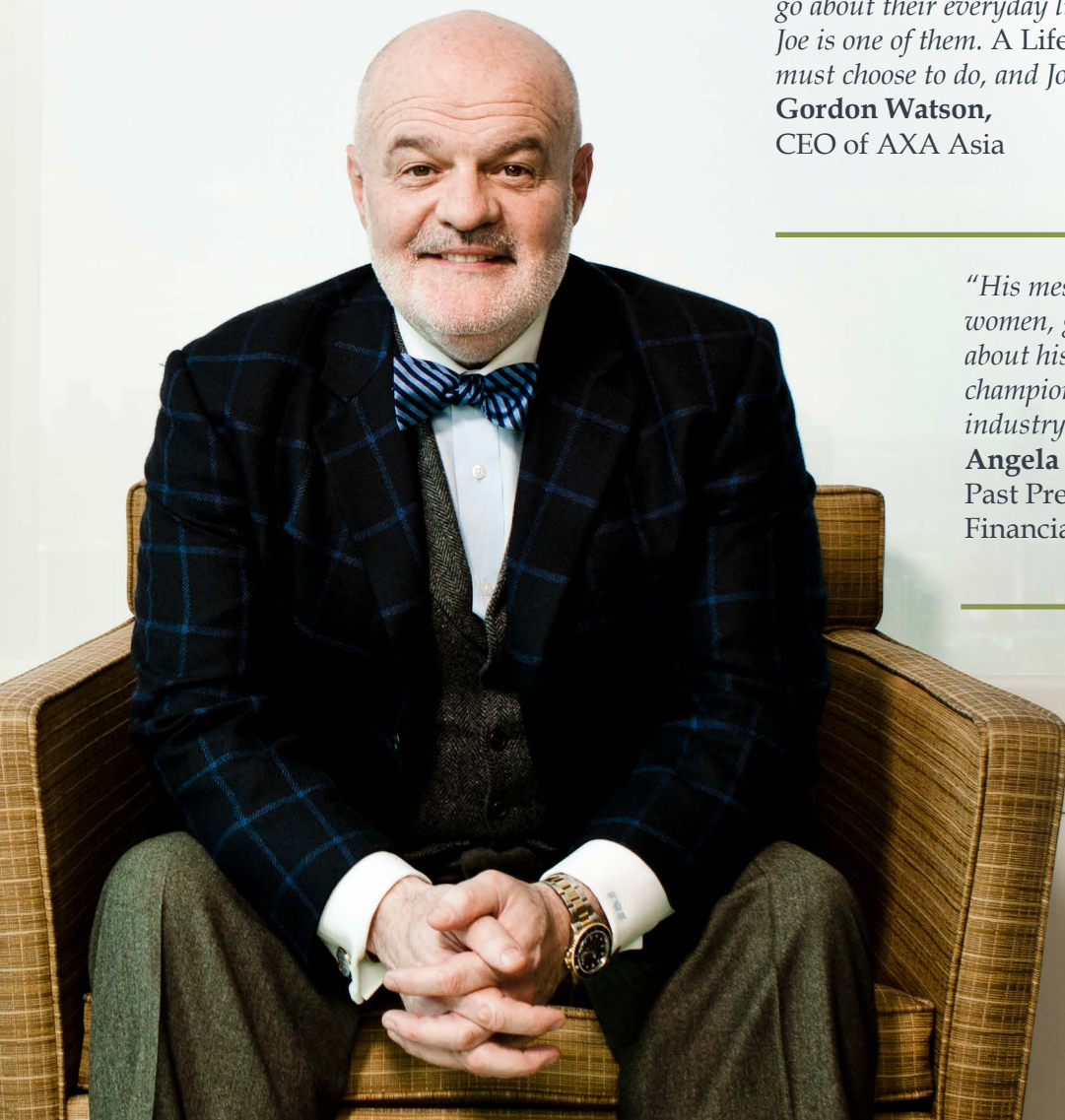
**Gordon Watson,**  
CEO of AXA Asia

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*"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

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*"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

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

**Jack Turner**

Past President, MDRT

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*"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)

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*"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

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*"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

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*"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

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*"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

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*"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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