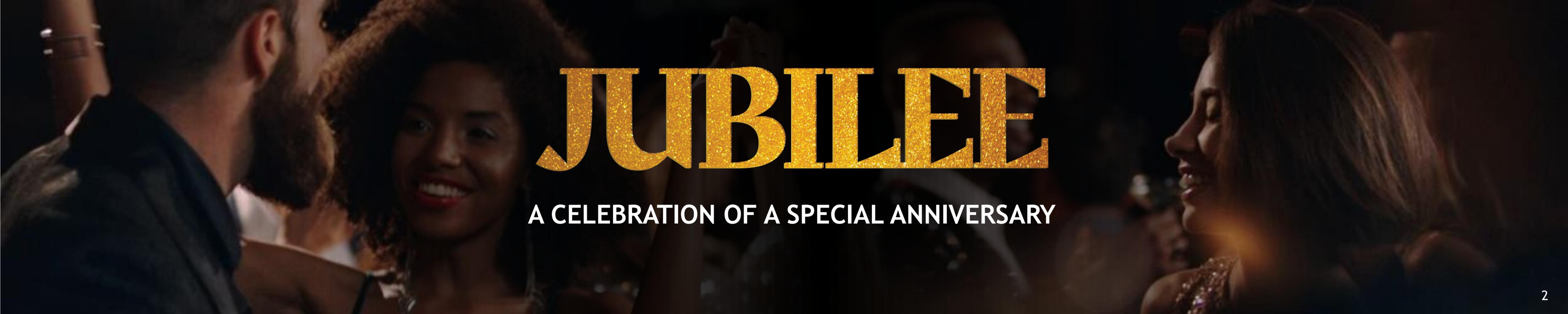




Keynote Address

Vince Giovinazzo, CEO

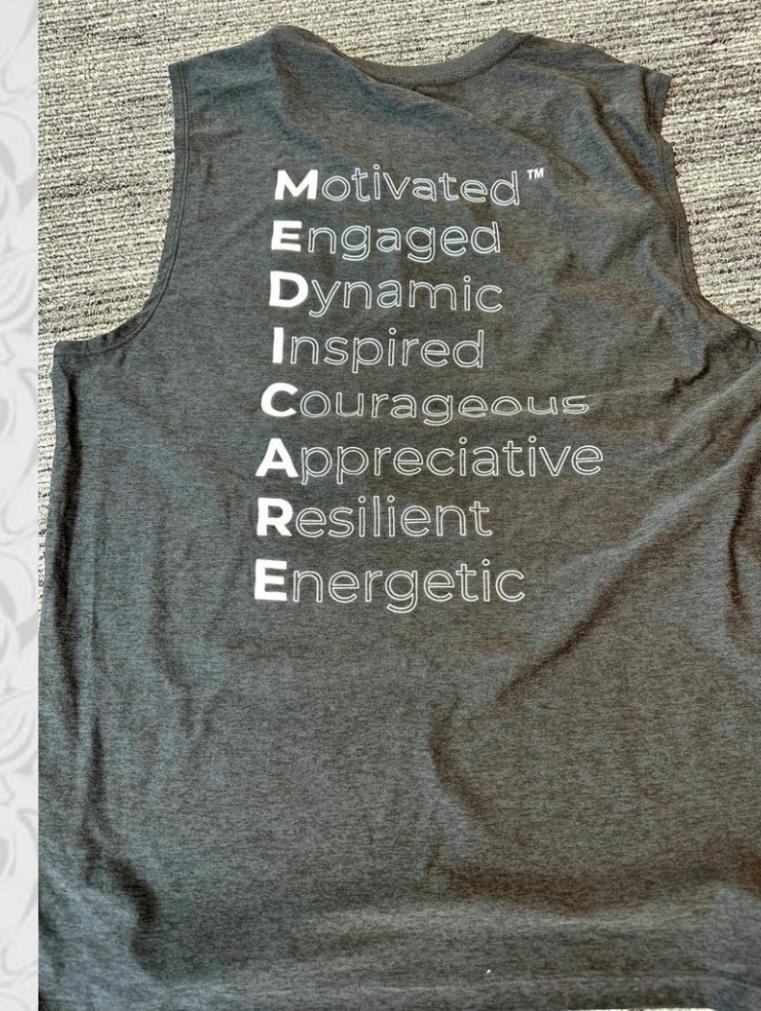
A collage of people at a party, with the word 'JUBILEE' in large, gold, glittery letters overlaid. The background is dark and features several people in profile, some smiling, suggesting a festive atmosphere.

JUBILEE

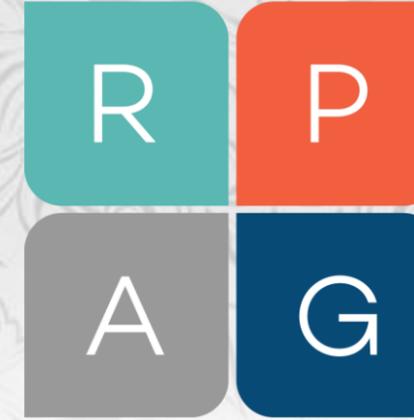
A CELEBRATION OF A SPECIAL ANNIVERSARY

65 Years

Vince is Medicare Eligible!



20 Years



“Founded by Advisors for Advisors”

Success Attributes

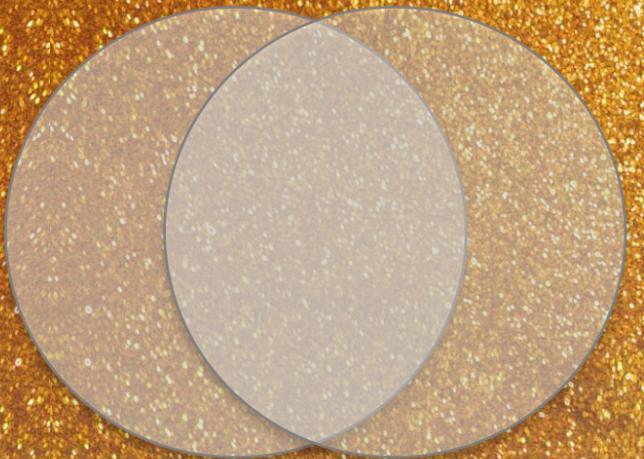
- Lessons learned
- Pitfalls to avoid
- Building a monumentally successful business (or life)

ATTRIBUTES OF SUCCESS

Operational

Human Interaction

Business



Personal



JOHN WOODEN

Success is...
Peace of mind...
Knowing you have done your best



#1 Think BIG, then think BIGGER!

1

**Think BIG,
then think
BIGGER!**

**“When you want to be more successful
more than you want to breathe, you
WILL BE SUCCESSFUL.”**

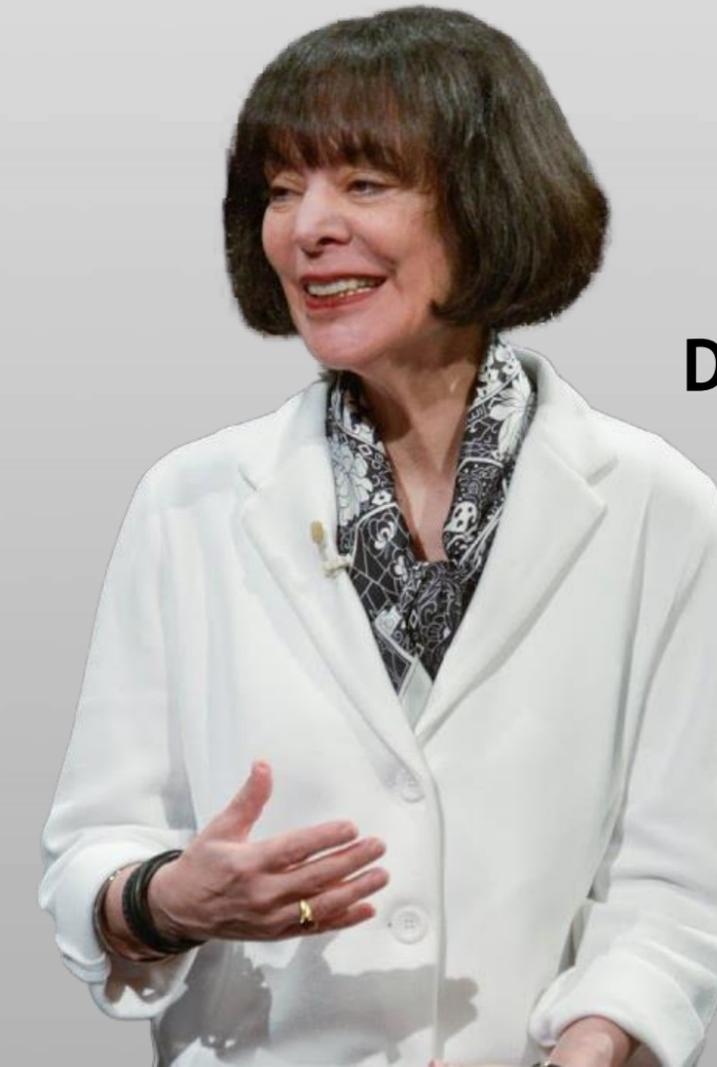
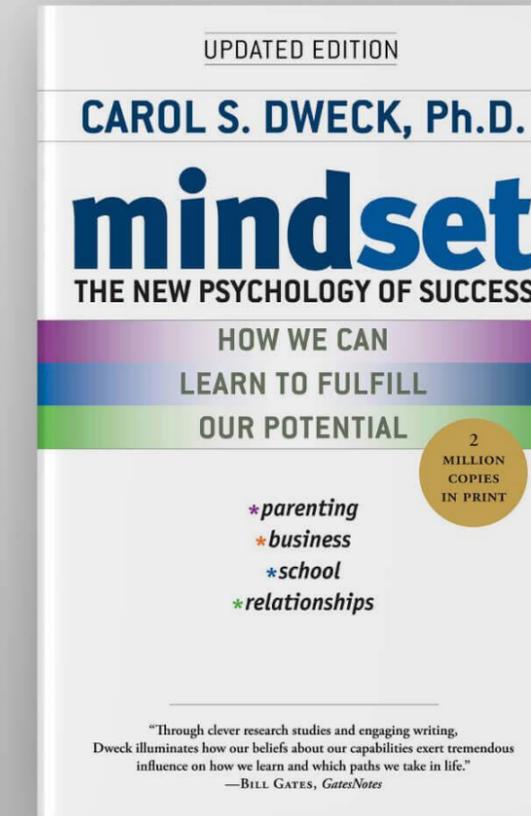
- Michael Jordan



1

Think BIG,
then think
BIGGER!

Growth vs. Fixed Mindset



Dr. Carol Dweck

1

Think BIG,
then think
BIGGER!

Think Big Examples

Day-to-day

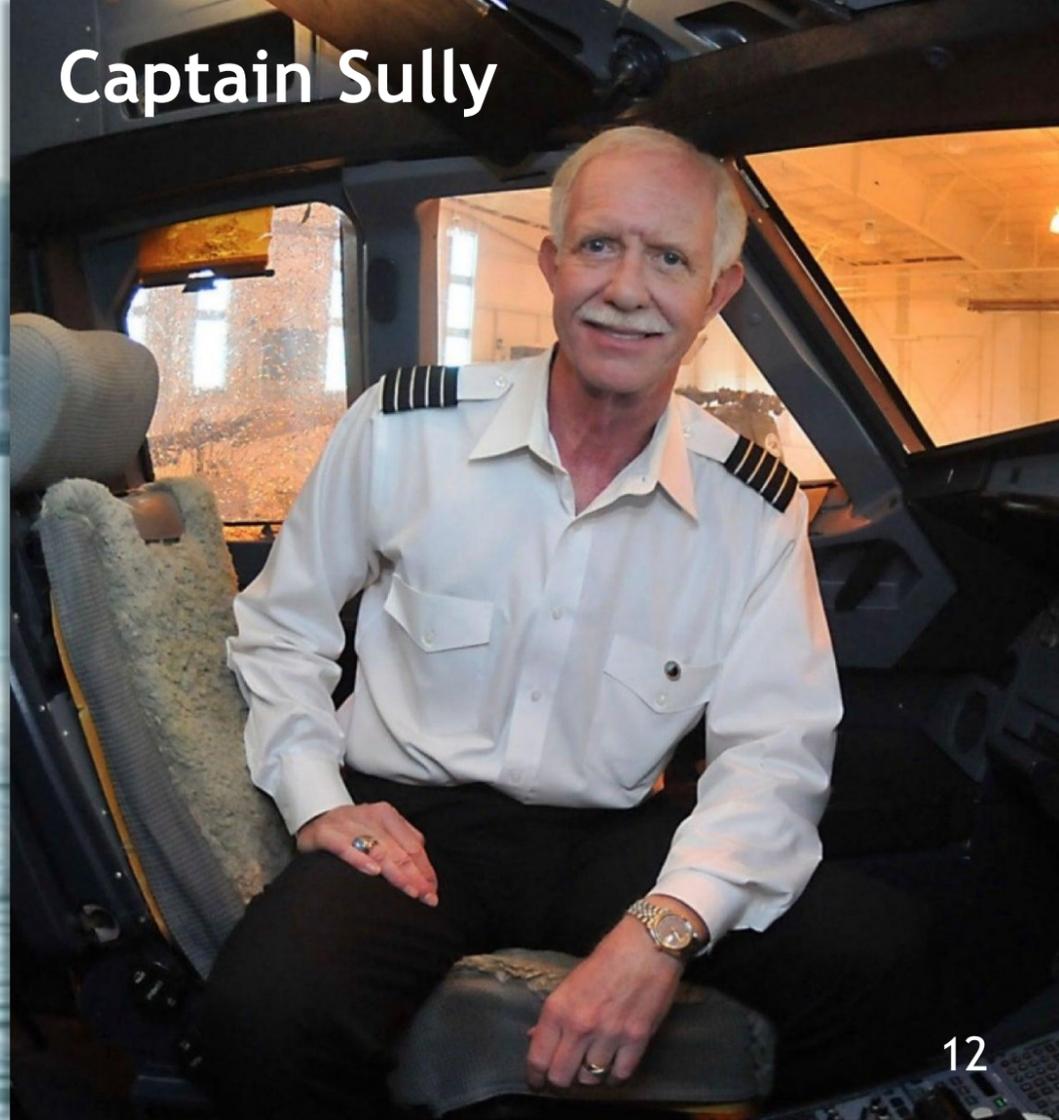


1

**Think BIG,
then think
BIGGER!**

Think Big Examples

Life or Death



Captain Sully

A person stands on a large rock in the foreground, looking out over a vast, flat landscape under a dramatic sunset sky. The sun is low on the horizon, casting a golden glow over the scene. The sky is filled with soft, wispy clouds, and the ground is a mix of light and dark patches, possibly sand and rocks.

#2

Start with Why?
What inspires you?

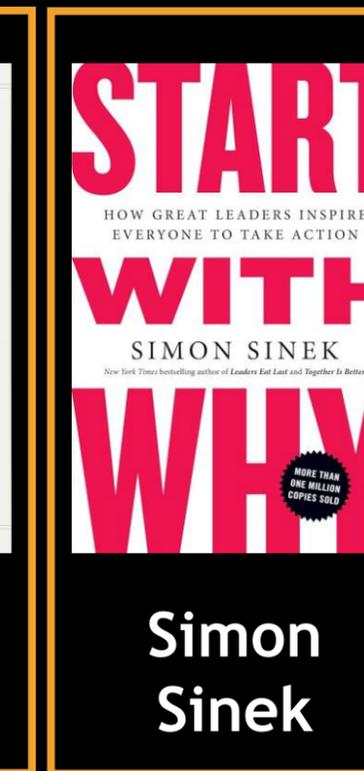
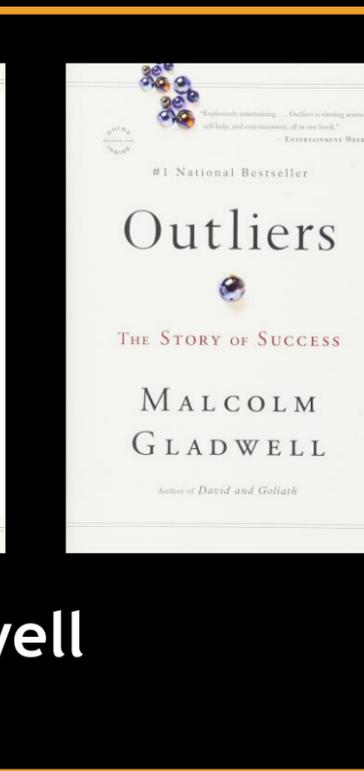
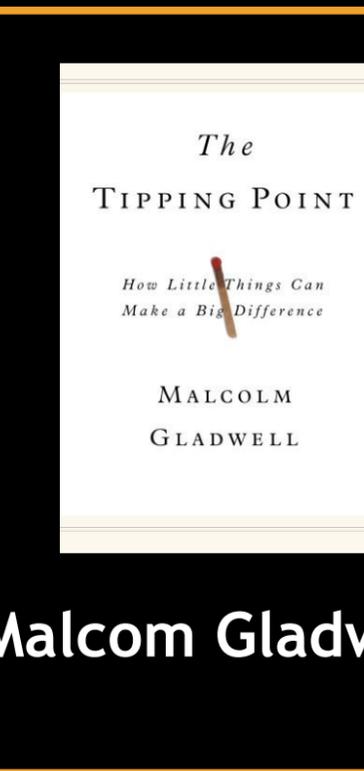
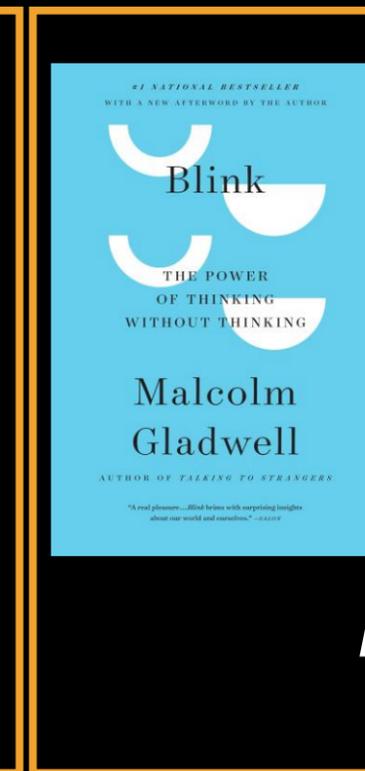
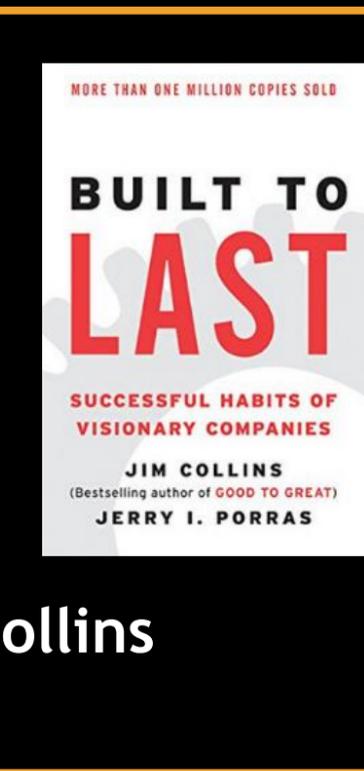
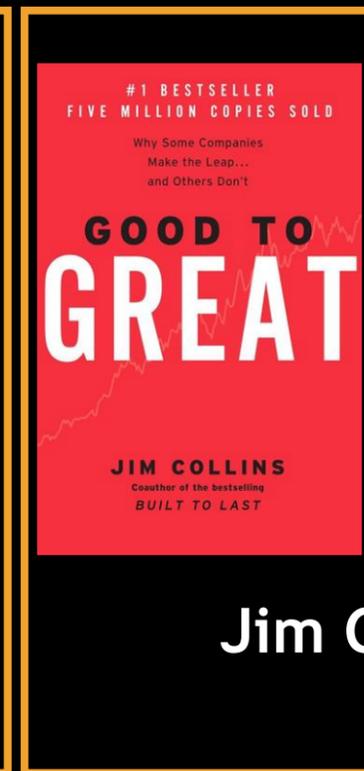
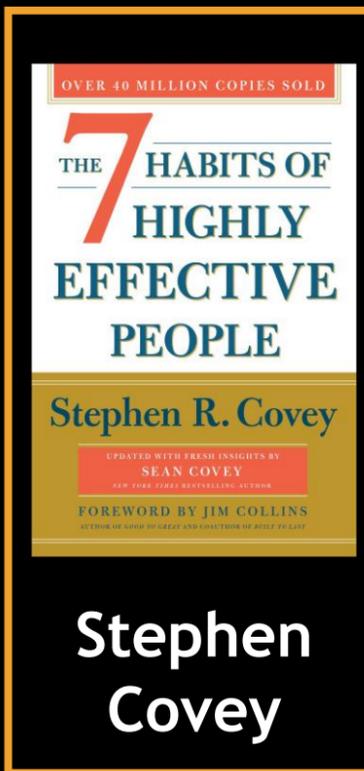
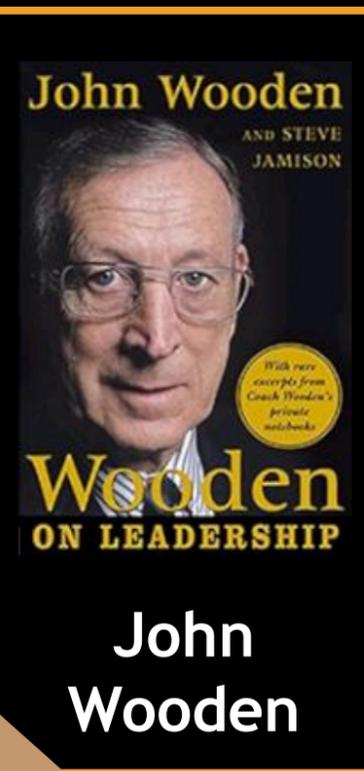
2

Start with
Why? What
inspires you?

What?

How?

Why?



2

**Start with
Why? What
inspires you?**

Why?

**“We are inspired to protect plan sponsors
and create successful retirement outcomes.”**

2

**Start with
Why? What
inspires you?**

How?

Sample Advisory Firm

“By leveraging technology, and software that enhances outcomes, providing hands on superior, and responsive guidance, and advice.”

2

**Start with
Why? What
inspires you?**

What?

“We will work with plan fiduciaries and participants to accomplish these objectives.”

#3

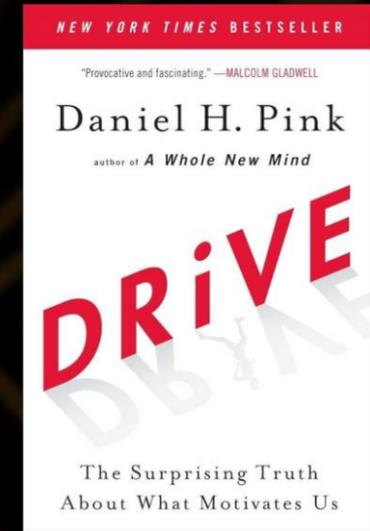
“The reward is the work itself.”

Deep enjoyment/fulfillment for what you do (usually follows #2)

3

Motivation 3.0

Daniel Pink "Drive"



In the zone.
Connected.
Mastery.
Purpose.

**"The reward
is the
work itself."**

3

**“The reward
is the
work itself.”**

NAVY SEALS

A group of Navy SEALs in full combat gear, including helmets and rifles, are positioned on a beach. The ocean waves are breaking in the background. The text 'NAVY SEALS' is overlaid in large, white, outlined letters across the center of the image.

#4

Resilience & Grit

“Perseverance during times of extreme stress, adversity, obstacles, or distractions.”

4

Resilience
& Grit

We all will face **EXTREME** adversity in our lives.



4

Resilience
& Grit

“Competitive Greatness”

John Wooden

The Pyramid of Success

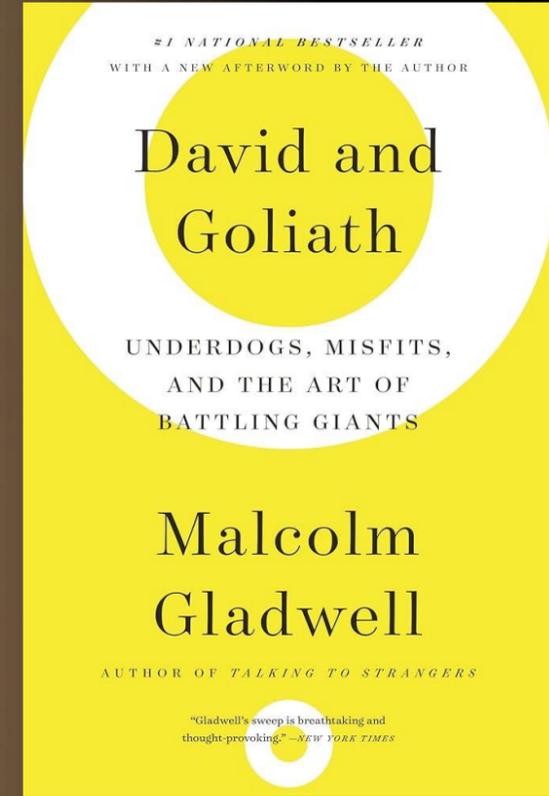


4

Resilience
& Grit



Malcolm Gladwell



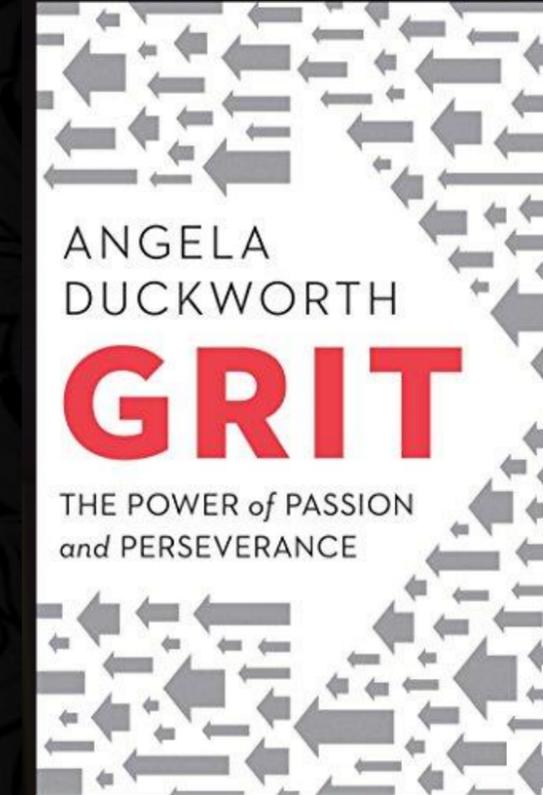
Facing Adversity

Give up



Dig in

Angela Lee Duckworth



4

**Resilience
& Grit**

Success...

never final.

Failure isn't fatal.

“It’s the courage to continue that counts.”



Winston Churchill

A close-up photograph of a hand holding a black pen, writing on a light blue notepad. A dog's paw is resting on the notepad. The background is dark and out of focus.

#5

Practice Gratitude

(Every single day)

5

**Practice
Gratitude**



HUMILITY



VULNERABILITY



APPRECIATION



AUTHENTICITY

GRATITUDE

5

**Practice
Gratitude**

SAY IT NOW

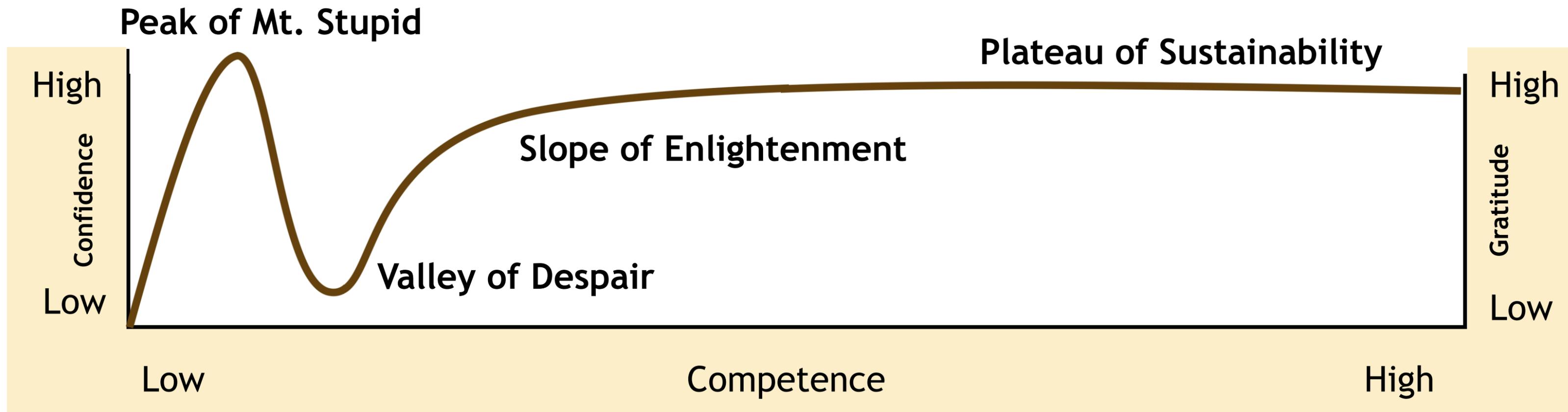
**“Express gratitude by paying tribute to the people
in our lives that make a difference.”**

- Walter Green

5

Practice
Gratitude

Dunning-Kruger Effect



A photograph of three business professionals in a meeting. Two men and one woman are seated around a table. The man on the left is pointing at a document. The man in the middle is looking at the document. The woman on the right is looking at a laptop. The background shows a modern office or meeting room with large windows and indoor plants.

#6

“Radical Truth and Transparency”

6

**Radical
Truth &
Transparency**

RAY DALIO

Bridgewater Associates

**“There is an obligation to share critical
feedback, ideas, and thoughts...”**

6

**Radical
Truth &
Transparency**

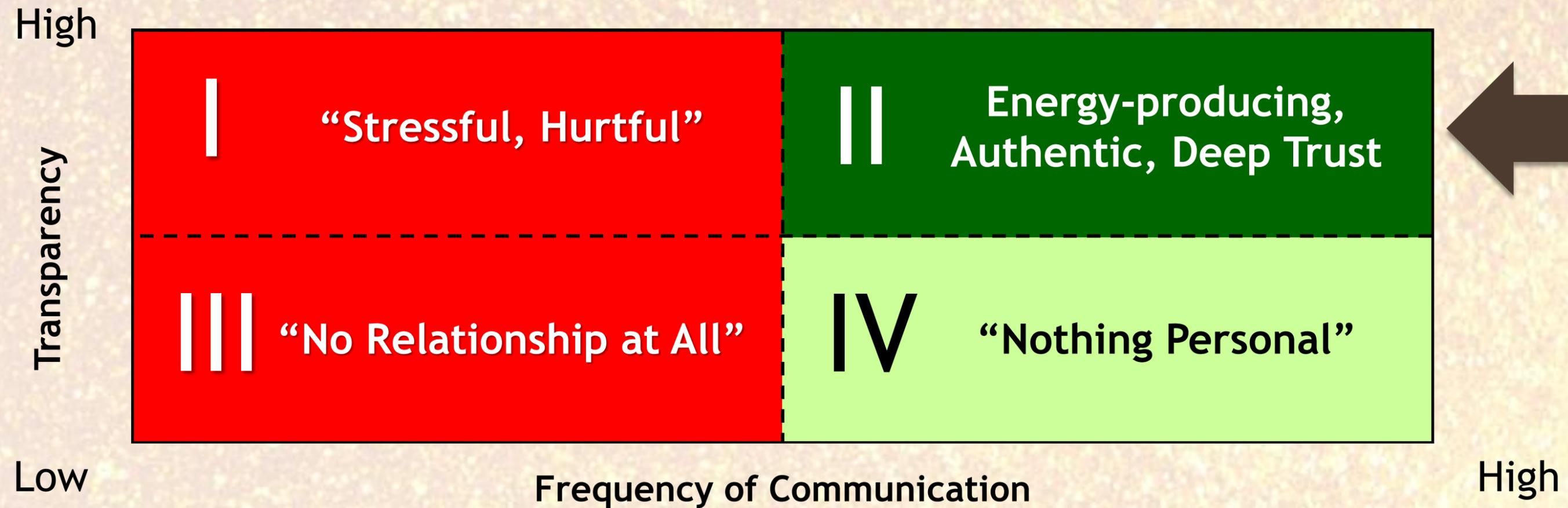
RAY DALIO

Bridgewater Associates

“...that have the potential to create or enhance customer outcomes and/or relationships...”

6

Radical Truth & Transparency



← This is the cultural DNA
that successful
firms/people strive for



Closing thoughts...

Attributes of Highly Successful Businesses / Individuals

1

**Think BIG, then
think BIGGER!**

2

**Start with Why?
What inspires you?**

3

**“The reward is
the work itself.”**

4

**Resilience
& Grit**

5

**Practice
Gratitude**

6

**Radical Truth &
Transparency**

RPAG Member

Attributes

1

**Think BIG, then
think BIGGER!**

2

**Start with Why?
What inspires you?**

3

**“The reward is
the work itself.”**

4

**Resilience
& Grit**

5

**Practice
Gratitude**

6

**Radical Truth &
Transparency**

Say It Now

NICK



DELLA VEDOVA

JAMI



CHAPMAN

VERONICA



LEE

JEFF



ELVANDER

JESSE



TAYLOR

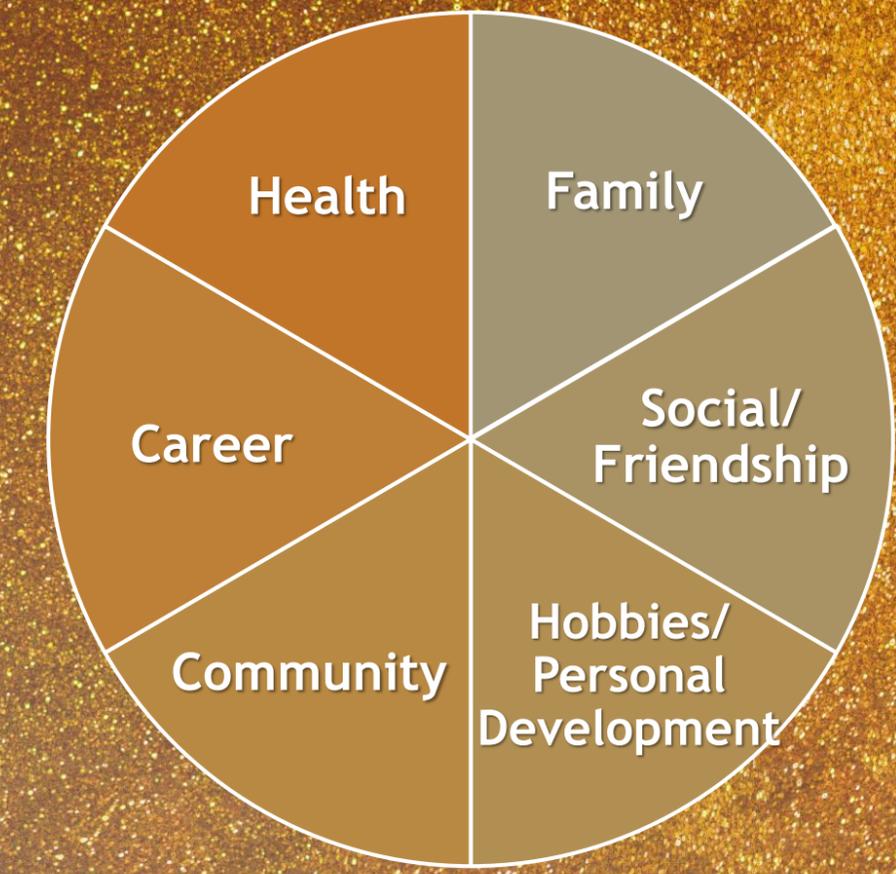
JOEL



SHAPIRO



BALANCED LIFESTYLE



THANK YOU!