

# Maximizing the Moments that Matter

## Support clients while retaining, consolidating and growing next-gen clients

Join the  
next-gen  
conversation!



Event 1: [Overview](#)

Event 2: [Health Event](#)

Event 3: [Caregiving](#)



### During the series, Suzanne and Jared:

- Frame “moments that matter” and unpack how these inflection points activate family and amplify the need to connect with financial professionals
- Do deeper dives into health events and caregiving – two key next-gen engagement opportunities – that hold high financial professional growth potential
- Offer actionable book mining, client engagement and conversational tips

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## Speakers



### Jared Nepa Senior Vice President

Jared serves as Senior Vice President and Head of Life and *MoneyGuard*® distribution for Lincoln Financial Distributors, Inc. (LFD), the wholesaling distribution organization for Lincoln Financial Group. In this role, he leads distribution for Lincoln's Life, Executive Benefits and *MoneyGuard* businesses, partnering across the enterprise and with external partners to develop and implement strategies to improve wholesaler value and effectiveness. Jared also leads LFD's Competitive Market Solutions group, focused on value-added resources and services to support financial professionals and clients.



### Suzanne Schmitt Managing Director, longevity and family financial platform builder, experience designer

Suzanne is Managing Director of NextChapter Innovation. She brings 15+ years of applied customer and financial professional insights, platform and partnership development, and longevity planning expertise to her work with the NextChapter team.

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Contact your Lincoln wholesaler to find out why these moments matter – for your clients and your book of business.

[Life Wholesaler Map](#)  
[MoneyGuard® Wholesaler Map](#)

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