Tom Hegna

CLU, ChFC, CASL

Keynote Speaker
Economist
Author
Retirement Income Expert
Financial Hall Of Fame Inductee

Media Kit

TomHegna.com

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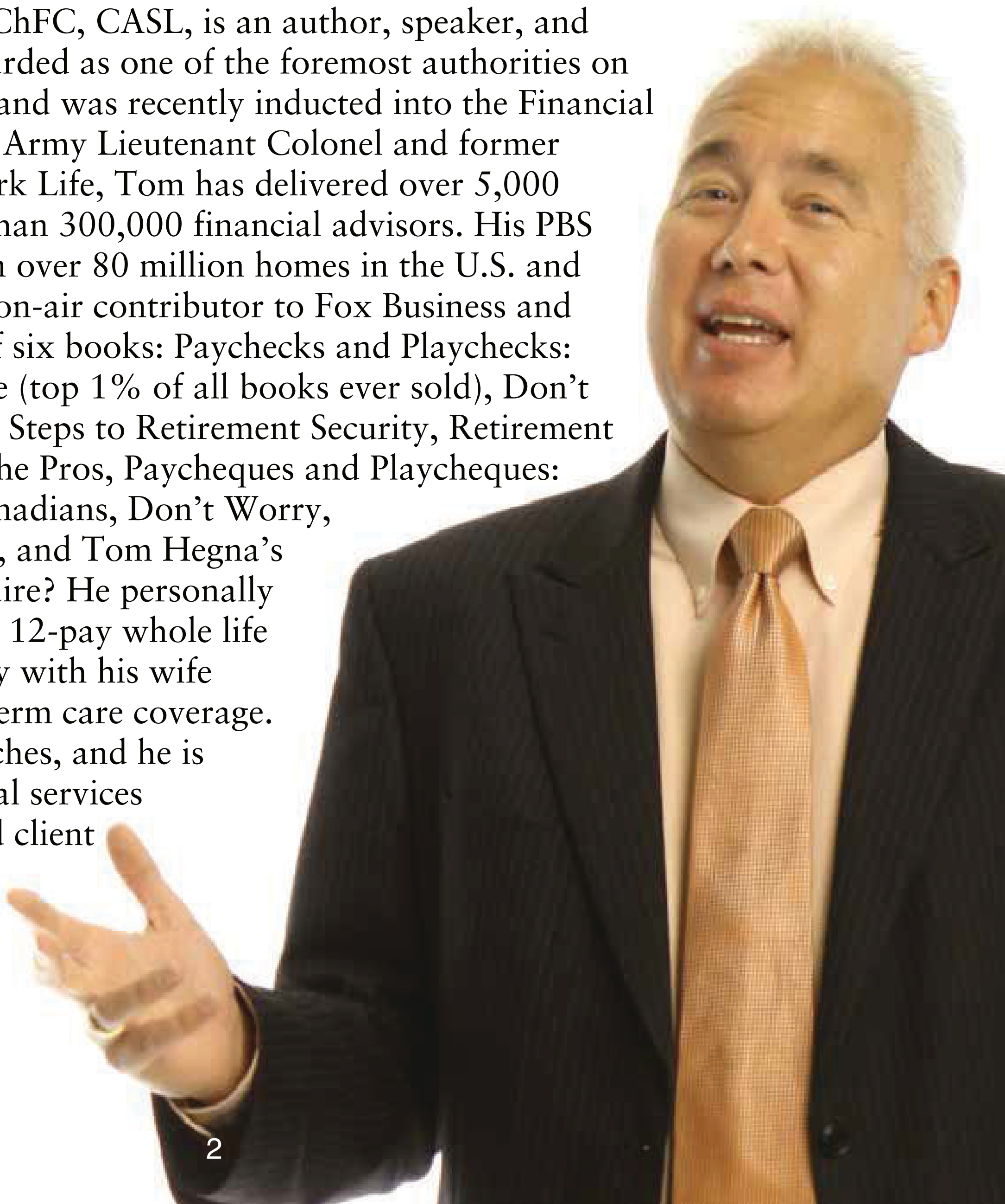
Biography

TOM HEGNA CLU, ChFC, CASL, is an author, speaker, and economist. He is widely regarded as one of the foremost authorities on retirement income planning and was recently inducted into the Financial Hall of Fame. A retired U.S. Army Lieutenant Colonel and former Senior Executive at New York Life, Tom has delivered over 5,000 seminars and trained more than 300,000 financial advisors. His PBS television special has aired in over 80 million homes in the U.S. and Canada, and he is a regular on-air contributor to Fox Business and CNBC. Tom is the author of six books: Paychecks and Playchecks: Retirement Solutions for Life (top 1% of all books ever sold), Don't Worry, Retire Happy! Seven Steps to Retirement Security, Retirement Income Masters: Secrets of the Pros, Paycheques and Playcheques: Retirement Solutions for Canadians, Don't Worry, Retire Happy for Canadians, and Tom Hegna's Who Wants to be a Millionaire? He personally owns 13 income annuities, a 12-pay whole life policy, a second-to-die policy with his wife Laurie, and unlimited long-term care coverage. Tom practices what he preaches, and he is available to speak to financial services companies, associations, and client audiences across the globe.



Background & Credentials

Retirement Expert

Tom grew up in Glenwood, Minnesota. He attended North Dakota State University on an Army ROTC scholarship, served as Cadet Battalion Commander, and graduated with honors earning three majors in four years. After six years of active duty in the U.S. and Europe, he continued serving in the U.S. Army Reserves for an additional 16 ½ years, leading Counter Terrorism Operations in the Pacific Theatre. He is a graduate of the Army's Command and General Staff College. He retired in 2006 as a Lieutenant Colonel.

Tom began his financial services career at MetLife, where he spent eight years as a top agent, manager, and National Marketing Manager. He then spent 15 years at New York Life, where he was responsible for driving their Retirement Income Initiative. He trained every New York Life agent, manager, and wholesaler. New York Life grew to dominate the retirement income market with a 42% market share, and sales grew from $700 million to over $4 billion during his tenure.

In 2011, Tom retired from New York Life to dedicate himself full-time to speaking, training, and consulting. He has been a member of the Elite "Million Dollar Speakers Group" of the National Speakers Association for over a decade, the top ½ of 1% of professional speakers worldwide. He was recently inducted into the Financial Hall of Fame and is also a member of the Arizona and Louisiana NAIFA Halls of Fame.

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

New York Life, MetLife, Allstate, State Farm Insurance, Nationwide, Country Financial, Merrill Lynch, Thrivent Financial, Northwestern Mutual, Ameriprise Financial, Pacific Life, Prudential, AIG, Allianz, Voya Financial, Sagicor, PennMutual, Wells Fargo, Waddell & Reed, Sun Life Financial, Investors Group, Mutual of Omaha, Securian

Past Speaking Engagements

Past Engagements

Tom has been described as a "road warrior" who has delivered main-platform keynotes on every continent. He has spoken before thousands of CPAs, attorneys, managers, agents, and their clients all over the globe. 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
2013 GAMA/LAMP Annual Meeting - Main Platform
2013 MDRT Day Taiwan - Main Platform
2013 NAIFA Annual Meeting - Main Platform
2014 NAFIC Annual Meeting - Main Platform
2014 PBS Special - Don't Worry, Retire Happy!
2015 WIFS Annual Meeting - Main Platform
2015 NAIFA Annual Meeting - Main Platform
2016 MDRT Annual Meeting (Spoke Twice)
2021 Baby Boomer Dilemma Movie - Featured Expert
2022 WIFS Annual Meeting - Main Platform
2022 MDRT Edge Meeting
2024 Heroes of Zero Meeting - Main Platform
2026 AnnuityProducers Live - Austin, TX

Tom has also headlined 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

Tom delivers phenomenal, motivational, and educational presentations that drive advisors and clients to action. He has had a multi-billion dollar impact on the insurance industry and can have a multi-million dollar impact on your organization. He is available for high-impact training sessions as well as client seminars, based in math and science, NOT opinions. Book Tom for your event today!

KEYNOTE TITLES:
- 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: The Math and Science of Retirement Income
- Tom Hegna's Who Wants to be a Millionaire?
- Don't Worry, Retire Happy for Canadians
- Social Security Optimization
- The Human Capital Imperative: Life Insurance in Retirement
- Long-Term Care: The Million-Dollar Problem
- Paycheques and Playcheques: Retirement Income Solutions for Canadians

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

VIRTUAL AND WEBINAR OPTIONS:
Tom delivers powerful virtual content to financial professionals and client audiences worldwide through his Webinar Method, in partnership with Advisorist. Webinar: $8,000. Podcast, Radio, or TV Guest: $1,000-$3,000. Cameo Videos: $500.

SPEAKING FEES:
Live Keynote: $15,000 - $30,000 plus reasonable travel and expenses. Contact JJ at:

Support@TomHegna.com or call 1-855-TOM-HEGNA (866-4346) for availability and booking.

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!"

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."

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!"

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."

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."

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."

**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 change I'm not here today! Thank you for everything that YOU do!"

SOCIAL MEDIA OUTREACH

Tom Hegna

DIGITAL REACH

84,000+	250,000+	6
COMBINED FOLLOWING	REACTIONS & LIKES	ACTIVE PLATFORMS

Facebook

facebook.com/TomHegnaSpeaks

- **30,000+** Followers
- **11,135** Average Organic Post Reach

YouTube

youtube.com/tomhegna

- **12,000** Subscribers
- Regular releases featuring **Paychecks & Playchecks**

LinkedIn

linkedin.com/in/Tom-Hegna-33683a40

- **42,000+** Connections
- **All-Star** Level Profile
- **99+** Skills & Endorsements

ALSO ON

X **@TomHegnaSpeaks**

INSTAGRAM **@TomHegnaSpeaks**

TIKTOK **@tom.hegna**

Tom Hegna

•Speaker •Author •Economist

•Retirement Expert

Virtual Outreach

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

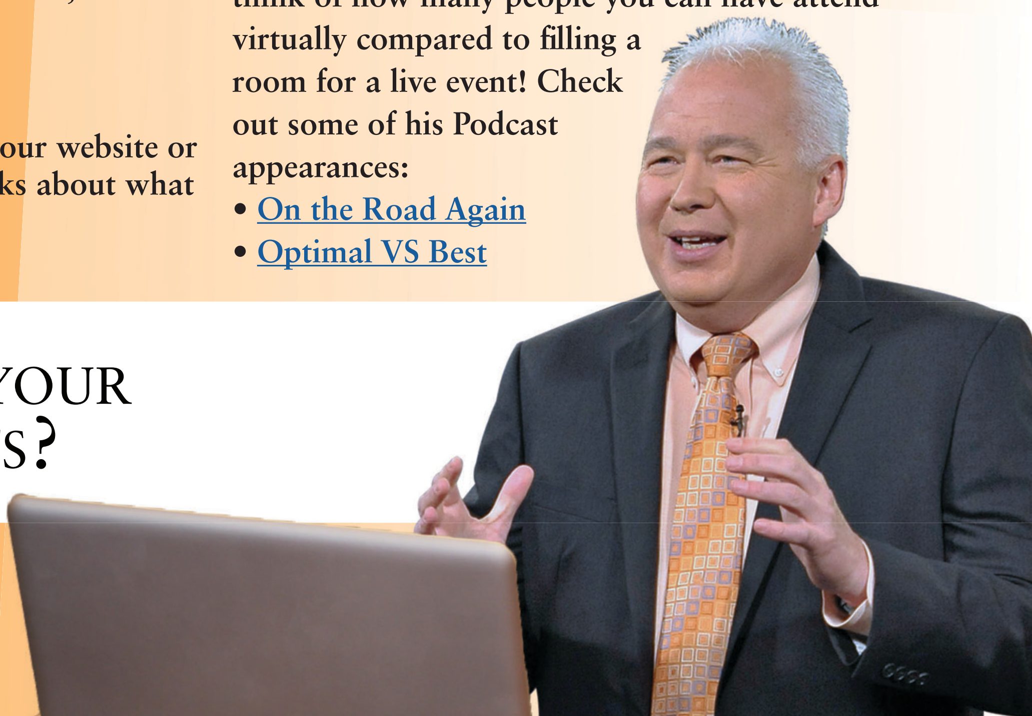
Get a one-to-two minute video for your website or social media channel where Tom talks about what you do.

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

TH ON DEMAND

Training

Coaching

Client Education

Interactive Online Training And Coaching For Financial Professionals

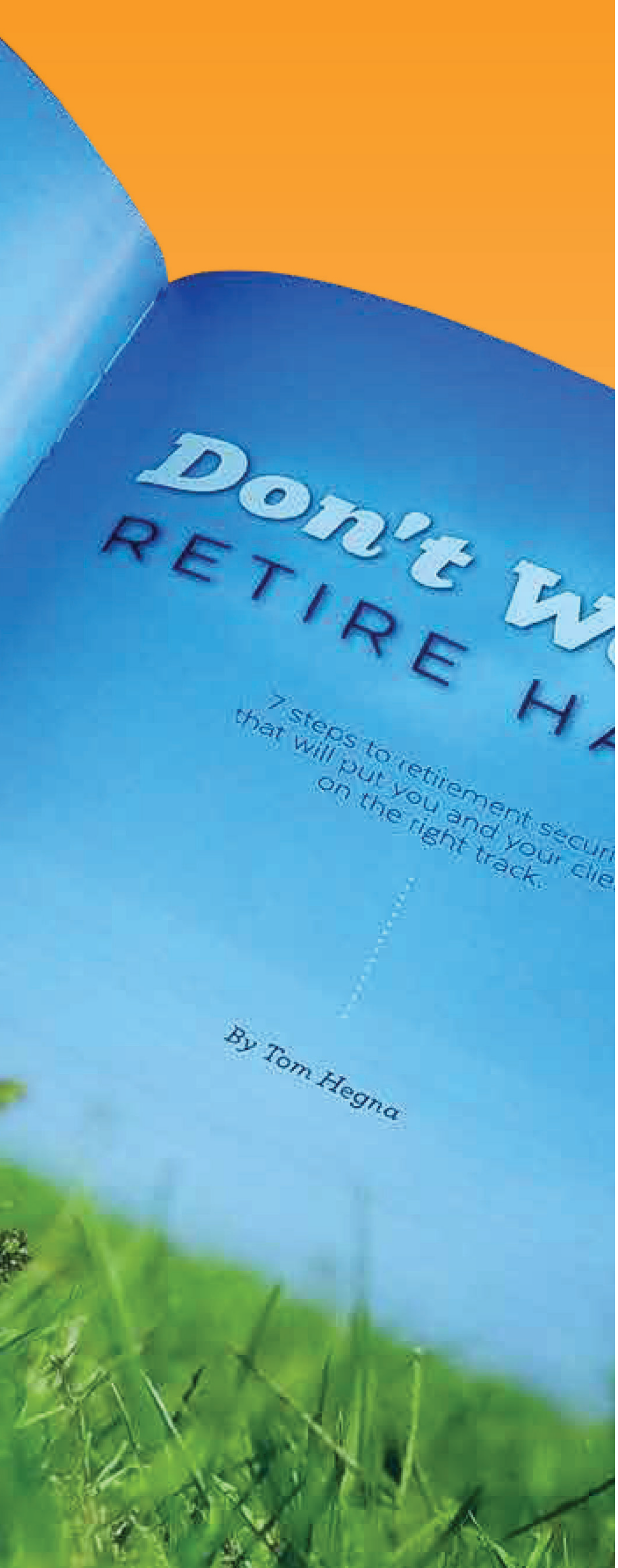
Tom Hegna On Demand is Tom's premier training, coaching, and client education platform: direct access to Tom's best content, strategies, and client-facing tools, updated continuously.

Signature offerings: Client Coach (convert prospects into clients with Tom's proven message) and Retire Happy U (Seven Steps client education), plus evergreen webinars with Advisorist.

$97 /MONTH

Visit 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:

CONSUMER AND NATIONAL PUBLICATIONS

Wall Street Journal (2025): Feature on Tom and Laurie Hegna's use of annuities in retirement planning

Kiplinger (April 22, 2019): "For Retirement You Need Paychecks AND Playchecks"

Forbes (July 1, 2021): "6 Uses Of Life Insurance In Financial Planning"

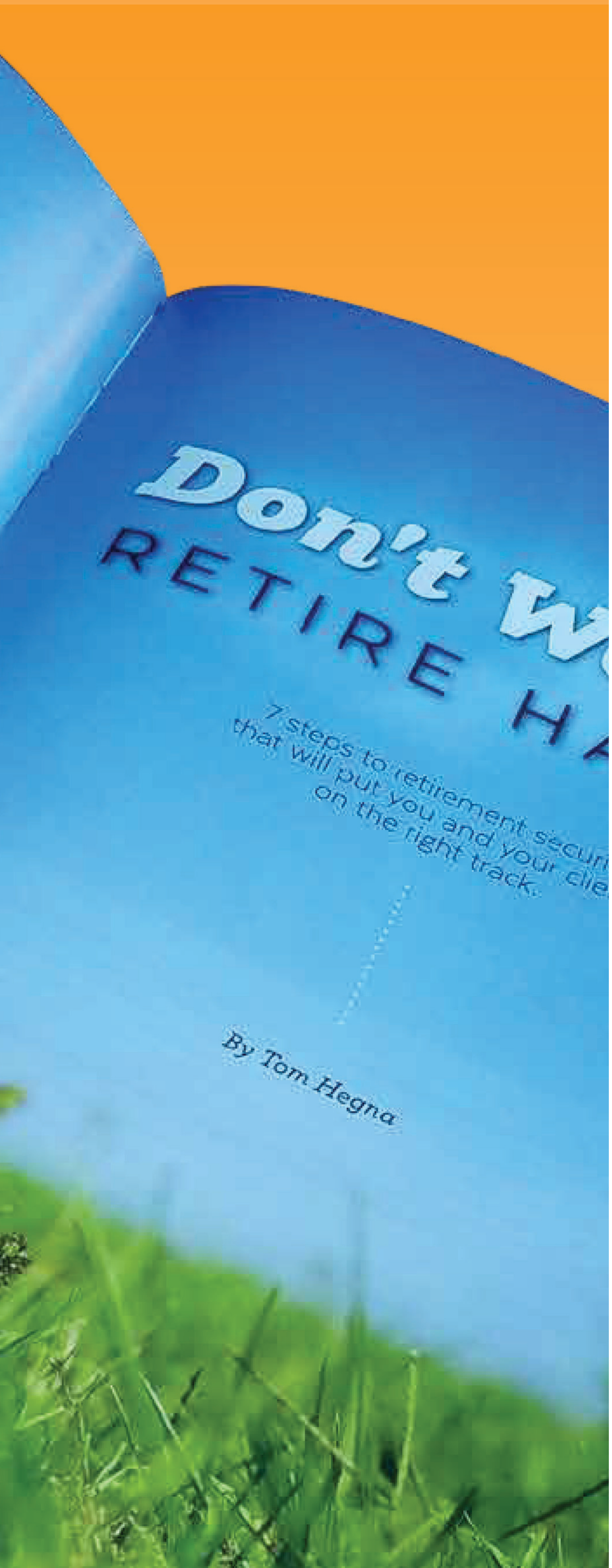
Forbes (June 13, 2018): "Experts Weigh In With 4 Strategies To Boost Retirement Savings"

Forbes (April 6, 2015): "6 Reasons To Consider Buying Longevity Insurance"

Forbes (March 9, 1998): "In Defense Of Annuities"

Fox Business: "Should Annuities Provide Your Retirement Paycheck?"

Featured Articles & Media



Featured Articles

INDUSTRY AND ADVISOR PUBLICATIONS

ThinkAdvisor (October 1, 2022): “Who Wants to be a Millionaire? with Tom Hegna”, in-depth interview on building wealth for younger generations, human capital, life insurance, and the rule of 72

ThinkAdvisor (December 7, 2022): “How to Overcome Market Turmoil and Make 2023 Your Best Year Ever”

ThinkAdvisor (January 1, 2021): “The Family Tree Strategy That Keeps Money In The Family”, multigenerational annuity strategies

ThinkAdvisor (October 23, 2020): “The Anti-Annuity Dominos Have Fallen”

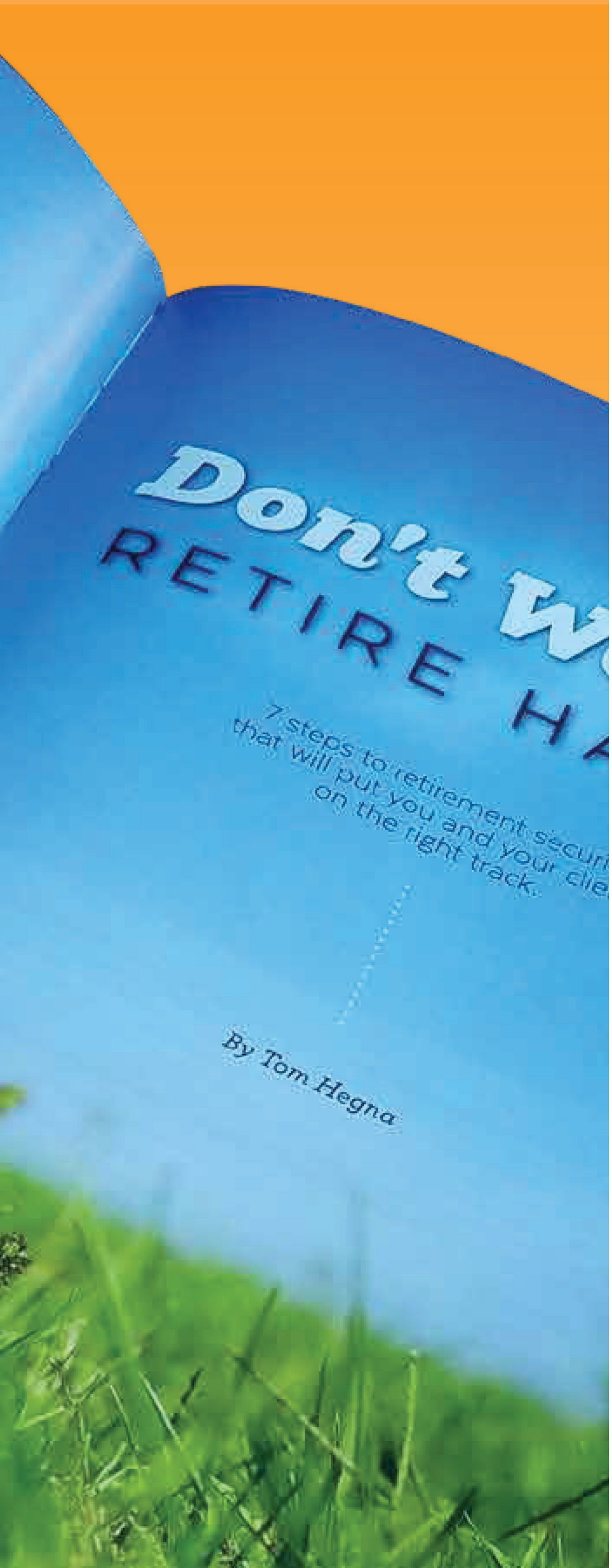
ThinkAdvisor (October 19, 2020): “Focus On Retirement Happiness To Make The Annuity Case”

ThinkAdvisor (October 7, 2020): “Classic Questions And Classy Comebacks From Tom Hegna”

ThinkAdvisor (2020): “Let’s Talk about Your Client’s M.U.G.”

ThinkAdvisor (July 11, 2018): “#32: Making Your Clients Retire Happy, with Tom Hegna”, podcast on retirement happiness, annuities, and Paychecks and Playchecks

Featured Articles & Media



Featured Articles

INDUSTRY AND ADVISOR PUBLICATIONS (CONTINUED)

ThinkAdvisor (2016): "How to Help Clients Avoid Mistakes in Retirement Planning"

ThinkAdvisor (2015): "Longevity Credits: The Time to Act Is Now"

ThinkAdvisor (2012): "Are RMDs the WMDs of a Retirement Plan?"

ThinkAdvisor (2009): "What to Know About Mortality Credits and Other Annuity Facts"

InvestmentNews (April 2, 2018): "New Rules for a 21st Century Retirement"

GAMA International Journal: "Don't Worry, Retire Happy!"

NAFA Annuity Outlook: "Helping Your Clients Plan for an Optimal Retirement by Preparing for the Impact of Taxes"

The American College of Financial Services: "Family Matters: Providing Answers for Times Like These"

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