

David Macchia's Defined Benefit Life School

*From Knowledge to
Sales – In One Day.*

DefinedBenefit
An Innovative Life
Insurance Strategy.
Patent Pending.
Life[®]



One Day. A Lifetime of Opportunity.

The Defined Benefit Life School will give you the skills, tools, and confidence to present the most compelling retirement income solution available today. Learn it. Sell it. Change lives.

Master the Future of Retirement Planning at Defined Benefit Life™ School

An Exclusive One-Day Training Event for Life Insurance Professionals

Retirement security in America is in crisis – and the opportunity for you to solve it has never been greater. **Defined Benefit Life (DB Life)** is revolutionizing the way Indexed Universal Life is sold, transforming it into a personal defined benefit pension plan for your clients. DB Life solves the challenges of traditional retirement planning, delivers unparalleled consumer value, and gives you the tools to take your business to the next level.

Join us for a full day of immersive, high-impact learning where you'll discover exactly how DB Life works, why it's the most important innovation in life insurance since the creation of universal life, and how you can position yourself as a retirement security leader in your market.

✓ Why Attend DB Life School?

- Learn the **origins of the defined benefit pension plan**, its growth, and its decline – and why this history matters for your clients today.
- Understand the weaknesses of the 401(k) as a sole retirement vehicle and how DB Life overcomes them.
- Gain **deep product knowledge** of DB Life, from policy design to ongoing management.
- Master the **Defined Benefit Life Policy Management System**, the key to lifetime client engagement and income stability.
- Discover how to **present DB Life to prospects** in a way that resonates, motivates, and converts.

✓ What You'll Leave With After DB Life School

- **A Clear Understanding of Defined Benefit Life** – Master the concept and see how it transforms Indexed Universal Life into a personal defined benefit pension.
- **Proven Sales Language & Scripts** – Confidently explain DB Life to prospects in a way that sparks interest and drives action.
- **Real-World Case Studies** – Learn exactly how other agents are winning big with DB Life.

- **Step-by-Step Implementation Guide** – From client introduction to policy issue and beyond, know every step of the process.
- **Powerful Marketing Tools** – Access presentations, brochures, and videos to jumpstart your DB Life sales.
- **Competitive Edge in Your Market** – Position yourself as the go-to retirement security expert.

Event Schedule

8:30 AM – 9:00 AM – Registration & Networking Breakfast

9:00 AM – 9:45 AM – The Rise & Fall of the Defined Benefit Pension

9:45 AM – 10:30 AM – The 401(k) Shift and Its Shortcomings

10:30 AM – 10:45 AM – Break

10:45 AM – 12:15 PM – Deep Dive: Defined Benefit Life Concept & Mechanics

12:15 PM – 1:15 PM – Lunch (Provided)

1:15 PM – 2:15 PM – DB Life Policy Management System

2:15 PM – 3:15 PM – Communicating DB Life to Prospects & Overcoming Objections

3:15 PM – 3:30 PM – Break

3:30 PM – 4:15 PM – Real-World DB Life Case Studies & Sales Strategies

4:15 PM – 4:30 PM – Q&A and Closing

About David Macchia

David Macchia is the creator of Defined Benefit Life, a groundbreaking innovation designed to transform life insurance into a powerful tool for delivering predefined levels of tax-free retirement income. A recognized pioneer in retirement income planning, David's work centers on solving America's retirement security crisis by redefining how life insurance and investment vehicles can be used to create personal pension-like outcomes. He is the inventor of one of the most significant sales strategies in the history of the life insurance business, the universal life private pension which first appeared in 1987 as "The IRA Alternative" from E.F. Hutton Life.

As the inventor of the Defined Benefit Investor platform and founder of Wealth2k, Inc., David has consistently led the industry with creative solutions that bridge technology, behavioral finance, and consumer education. His earlier innovation, The Income for Life Model®, is one of the most widely used retirement income strategies in the financial services industry.

A prolific author and respected thought leader, David has written three books and over 100 articles focused on modern retirement planning. He has served as a consultant to top-tier insurance companies including AIG, ING, MassMutual, Jackson National, Aviva, and Sun Life, helping to drive billions in annuity and life insurance sales through his consumer-friendly digital solutions.



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