



DAVE PAULSEN

In-Person or Virtual Conferences | Webinars | Workshops | Keynotes | Podcasts

Dave Paulsen is a dynamic and insightful speaker with more than 30 years of experience in the financial services industry. With his trademark passion for helping Americans become retirement-ready, Dave offers in-depth analyses of the industry landscape—with the goal of driving success for all stakeholders in the retirement planning supply chain.

“The retirement planning industry needs to do more to encourage and embrace forward-thinking retirement strategies.” *-Dave Paulsen*

NOTABLE ROLES

President - Transamerica, Individual Solutions Group

Chief Distribution Officer - Annexus Retirement Solutions

Chief Distribution Officer - Transamerica

Chief Executive Officer - World Financial Group

Chief Executive Officer - Transamerica Financial Advisors

SPEAKER TOPICS

- Retirement income solutions
- Target date funds
- Lifetime income
- Guaranteed income
- Annuities
- Asset management
- Product innovation
- Leading industry change
- Retirement plans
- Insurance solutions
- The need to challenge traditional thinking

PAST SPEAKING EVENTS

40 Coaching Forums, 16,000+ advisors in total

25+ broker-dealer conferences focused on financial products and lifetime income solutions

10+ Third Party Administrator focused events

Mainstage speaker at World Financial Group Conference

Multiple Plan Sponsor Focused Events, 150+ plans sponsors in attendance

Frequent panelist and main stage speaker

Frequent panelist at:

LIMRA

DCIIA

Insured Retirement
Institute

Alliance for
Lifetime Income

Annuity
Conferences

Retirement Plan
Conferences

Contact Amy Borgesen at Media@arsfinancial.com to book Dave Paulsen.