



Rob Hagg

Principal

"Compliance surrounding retirement planning continues to gain fiduciary scrutiny. I help firms develop global plans to address the gap in interest-rate sensitivity, create fixed income streams and place FIAs in financial plans with a higher level of fiduciary responsibility."

Advisors are faced with providing multi-tiered services, maintaining assets under management and growing their businesses. Due to competing interests and limited resources, the implementation of insurance strategies is often an after thought. Rob has firsthand experience in balancing services to integrate a suite of insurance strategies. As a partner for a firm with \$150M assets under management, he incorporated this strategy and helped it grow to nearly \$1B in four years using insurance strategies as a primary driver.

As the principal of ChangePath, he and the team focus their efforts on technology firsts that provide independent advisors unique investment approaches coupled with strong operating models that edges out the competition. In addition to being a founder of ChangePath, Rob is the Senior Vice President, Life Sales and Integrated Financial Services at CreativeOne.

Advisors benefit from his coaching and his point-of-sale knowledge of advanced concepts involving family endowments, foundations and corporations. His success in developing wealth accumulation and transfer strategies with insurance solutions for his former clients is unparalleled.

Rob can show an organization how to combine assets, insurance and savvy strategies by wrapping proven models around existing offerings. His team also uses established methods to eliminate trial and error associated with aggressive growth cycles.

Rob began his career with New York Life and earned a spot as a top producer before he saw the advantages of working as an independent advisor and sought his independence. As a multi-time Million Dollar Round Table qualifier, he joined a wealth management firm in Kansas City as the Insurance Director. He was quickly embraced by ownership, and offered the position of Partner and President of the Insurance Division. Rob continued to expand the offerings of the business and earned a spot as a top 10 producer for Aviva Life and Annuity Company.

Originally from the northwest Chicago suburbs, Rob remained in Kansas City after completing his Bachelor of Science in Business Communications from University of Kansas and obtained his Master of Business Administration from Rockhurst University. He enjoys spending time with his wife, their four children and supporting several non-profit organizations.

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