

FIRESIDE CHAT — SPEAKER PREP SHEET

Enterprise Leadership Session · Partnership, Growth, and Driving Sales Together

★ YOUR 3 INTENTIONAL OUTCOMES (Read before you walk on stage)

OUTCOME 1

Every person in that room covets a relationship with Josh and Pacific Bridge.

OUTCOME 2

They understand Pacific Bridge is not for everybody — and that makes the right ones want to prove they qualify.

OUTCOME 3

They leave believing Pacific Bridge is building for where the industry is going — not where it is.

⚡ DELIVERY RULES — NON-NEGOTIABLE

THE FORMAT

- This is a 2-person interview, not a panel. You are in control.
- Doris asks. Your answer runs the show.
- Pause after big lines. Let silence do the work.
- Two anchor points per question: your opener and your closer. Everything in the middle is yours to fill conversationally.
- You can redirect any question: "I love that — but the real question is..."

THE CLOSER TRICK

Save your single most powerful line for the very end of Q3. Even if you're technically done.

Then say:

"Wait — before I move on, I have to say one more thing."

Great speakers do this on purpose. It breaks the pattern and makes that last line stick.

Q1 — CULTURE (6–7 min)

THE QUESTION (what Doris will say):

"Every agency has a different culture. I can say without reservation that Pacific Bridge defines its culture better than almost any firm I work with. Can you tell us about that culture and why it's so important?"

🎯 OPENER (memorize this)

"Culture at Pacific Bridge comes down to five words."

Mahalo. Aloha. Ohana. Pono. Imua.

🎯 CLOSER (memorize this)

"Pacific Bridge is not for everybody."

"Everything else is just those values made operational."

"Some people arrive thinking the values are words. Then they realize we live them. And they have to decide."

"But for the right firms? We are indispensable."

BULLET POINTS — FILL THE MIDDLE WITH THESE

HOW WE HIRE

- Start with 2 questions: favorite teacher / least favorite — why?
- Not looking for the right answer — looking for self-awareness
- Resume tells me what you've done. Those questions tell me who you are.

HOW WE REINFORCE DAILY

- Morning standup: one critical priority per person
- Rotate one core value per day
- Each person names someone they saw living that value
- "We are training ourselves to notice integrity."

WHY IT MATTERS COMMERCIALY

- When a case is hard, culture guides the response
- Determines: transactional reaction vs. long-term trust
- Carriers feel it. Partners feel it. Producers feel it.

OPTIONAL BRIDGE TO Q2:

"And that same culture of discovery — really understanding before we act — is exactly how our partnership with Lincoln deepened."

Q2 — RELATIONSHIP EXPANSION (5–6 min)

THE QUESTION (what Doris will say):

"TPBC isn't new to the Agency Channel, but in recent months the nature of our relationship has significantly expanded. Let's talk about how that came to be."

🔗 OPENER (memorize this)

"I want to be honest about how this actually happened — because the honest version is more interesting than the polished version."

"We didn't deepen this relationship because Lincoln knocked on our door. We went after it."

🔗 CLOSER (memorize this)

"Revenue followed alignment. It always does."

OR the bomb drop:

"If any of them left Lincoln tomorrow, I'd try to hire them before they updated their LinkedIn."

BULLET POINTS — THE PEOPLE TO NAME (do this — it makes friends for life)

Nick	The one who'd respond at 11 PM. "I can't wait for him to get back." Acknowledge his absence with warmth — don't skip it.
Cliff	Showed up to our educational forums not to pitch — to understand how we actually operate.
Mitchell	Did serious illustration modeling so we could build tools responsibly.
Doris	Worked through LPOAs and compliance questions so we could scale with confidence.



OHANA TIE-IN:

"Ohana doesn't mean everything is great. It means we have the hard conversations. It means when we come to them with something that sounds crazy, they ask questions instead of saying no — and we find the bigger yes together."

Q3 — EVOLUTION & OPPORTUNITY (6–7 min)

THE QUESTION (what Doris will say):

"As our relationship has grown, my perception of TPBC has evolved from a firm focused on high-net-worth foreign national clients acquiring life insurance. How has your model evolved — and what do you see as tomorrow's biggest opportunities?"

 OPENER (memorize this)	 CLOSER (memorize this)
<p>"That perception was accurate. But here's the more important question:"</p> <p>"Where is the world going?"</p>	<p>"Lincoln fits because they engage strategically. They want to understand direction before chasing production."</p> <p><i>"That's rare. And for an organization building toward a horizon most people can't see yet — that's exactly the kind of partner we need."</i></p>

BULLET POINTS — THE BIG VISION

<p>THE MACRO PICTURE</p> <ul style="list-style-type: none"> • The world is globalizing. Families, assets, wealth — all mobile. • The entire financial services industry is on the sideline missing it. • AI will commoditize the basics. Only boutique specialists win at the top end. • That's not a threat — that's our lane. <p>THE SELF-DEPRECATING LINE (use it)</p>	<p>WHERE WE'RE BUILDING</p> <ul style="list-style-type: none"> • Advisor-to-advisor collaboration at global scale • Across banking, investment, insurance, tax, and law • Private placement life insurance + annuities for the upper market • Building relationships with investment advisors who'll need what we know
---	---

"We're moving fast enough that sometimes my own team doesn't fully understand what we're building yet. But that's why we come back to our core principles every morning — because when you're heading toward a horizon most people can't see, your values are your compass."

"The whole industry is on the sideline. We're on the field."

TAKEAWAY PHRASES — MEMORIZE THESE 10

- 1 "Culture at Pacific Bridge comes down to five words: Mahalo, Aloha, Ohana, Pono, Imua. Everything else is just those values made operational."
- 2 "We are training ourselves to notice integrity."
- 3 "Pacific Bridge is not for everybody. But for the right firms? We are indispensable."
- 4 "Some people arrive thinking the values are just words. Then they get here and realize we live them. And they have to decide."
- 5 "The honest version of this story is more interesting than the polished version. We didn't wait for Lincoln to come to us. We went after the relationship."
- 6 "Companies don't show up for you at 10 PM. People do."
- 7 "If any of them left Lincoln tomorrow, I'd try to hire them before they updated their LinkedIn."
- 8 "Revenue followed alignment. It always does."
- 9 "The world is globalizing. The entire financial services industry is on the sideline missing it. That's not a problem for us — that's our lane."

10

"We're heading toward a horizon most people can't see yet. That's why we come back to our values every morning — they're our compass."



IF YOU GET STUCK

REDIRECT THE QUESTION

"I love that question — but I think the real question is..."

Then answer the version you want.

BUY A BEAT

"That's worth slowing down on for a second."

Pause. Let it breathe. Then answer.

LAND THE PLANE

"The bottom line is this:" then give your closer line.

Works for any question, any time.