



LIONSMARK  
CAPITAL

2026 LIONSMARK CAPITAL

# Resource Partner Guide

# Welcome Letter

Lionsmark Capital is proud to present our exclusive 2026 Resource Partner Guide, designed to build lasting, high value partnerships with industry leading firms across the financial and insurance sectors. Our unique platform provides partners with deep access to a national network of high net worth advisors, seasoned professionals, and wealth strategists.

Resource partnership includes presence at high profile events, strategic branding, and a direct relationship with Lionsmark's advisors, team, and marketing ecosystem.



*Darren Sugiyama*

FOUNDER OF  
LIONSMARK CAPITAL

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# What We Have In Common

We both share the vision of client focused service and a commitment to integrity. We both have a mutual recognition of the importance of genuine solutions that meet the unique needs of each client. We have seen how dedicated you are to fostering long term relationships with clients, investing in strategies that prioritize their wellbeing, and building their confidence in achieving their goals. Join our program so we can market your brand along with ours!

You've provided valuable insight into the core objectives that drive your approach to client service and business development. We've delved into strategies for deepening client engagement, staying ahead of regulatory changes, and fostering efficiencies that make a tangible difference in your daily operations.

You've shared with us some of the key challenges your organization faces. Balancing personalized service with operational efficiency is a priority, as is having access to up to date insights and tools that streamline decision making and add value to client interactions.

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*“Collaborating with Darren Sugiyama and the Lionsmark Capital team has significantly enhanced our premium financed life insurance offerings. Darren’s unmatched expertise. Lionsmark Capital’s dedication to transparency, innovation, and client success positions them as an essential partner for any financial advisor aiming to expand their business through premium finance strategies.”*

*– Neal Quon, Principal – Adaptiv Partners*

# Our Solutions

Are you looking for extra opportunities to be seen by insurance industry professionals? Do you want your brand to be seen across our hundreds of thousands of touchpoints within our marketing ecosystem?

Let's work together to provide value to new and existing clients by aligning your brand with ours!

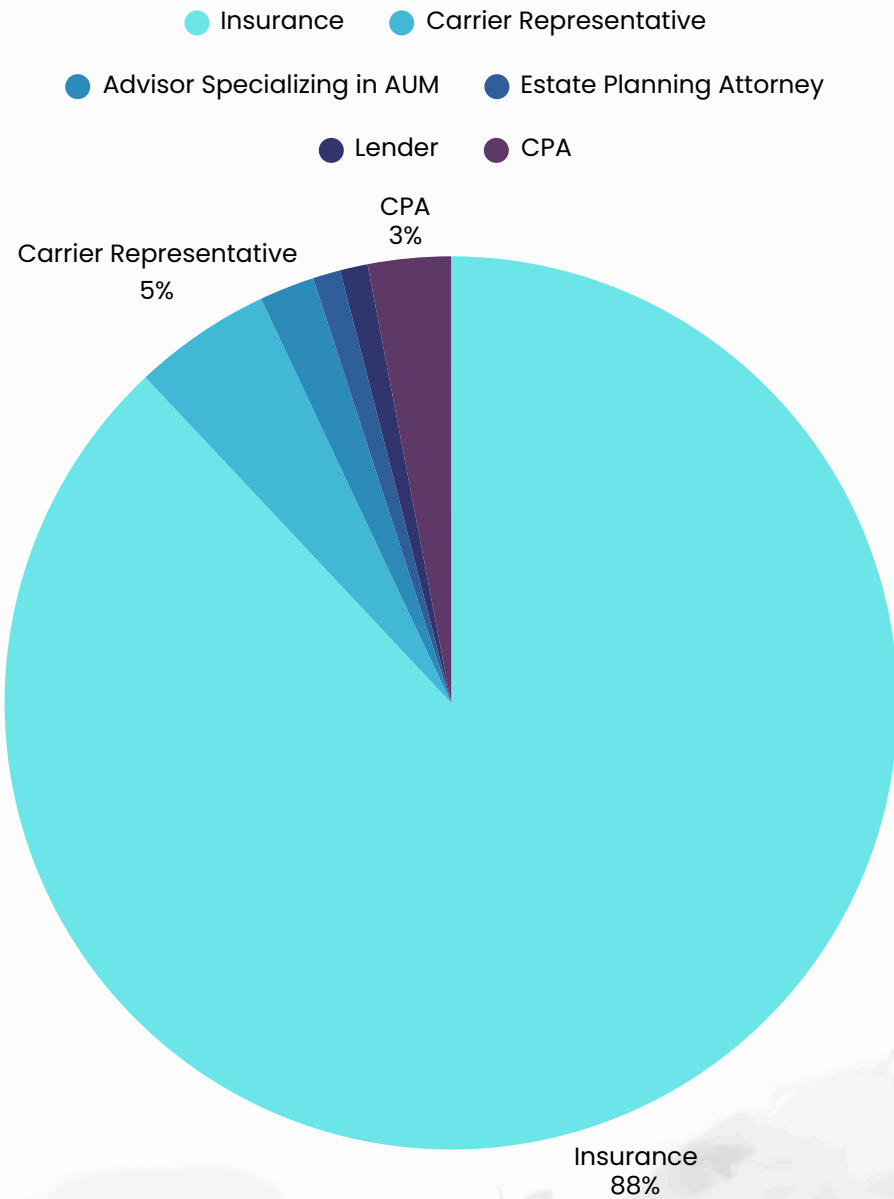
These touchpoints (impressions) can be seen through our marketing solutions:

## Our Touch Points

<b>Emails</b>	Our database contains over 10,000 industry professionals. Include your logo on our emails as a Resource Partner. We distribute over 200,000 emails a year.
<b>Events + Networking</b>	Featured and highlighted as a resource partner on event materials including emails, program guide, & conference signage.
<b>Webinar Hosted by Darren</b>	Let us know if you would like to be interviewed by Darren Sugiyama on a dedicated webinar.
<b>Program Guide</b>	Please provide Advertorials - these are educationally based, not advertisements, that will be included on a single page in the program guides for our events.
<b>Masterminds</b>	Invitation only, small group working session that brings together Lionsmark Capital leadership and select resource partners for confidential, high level collaboration, idea sharing, and problem solving.

# Program Components

## 2025 REACH & IMPACT



**ATTENDEE DEMOGRAPHICS**

**380+**

**2025 ATTENDEES**

**28**

**STATES REPRESENTED BY ATTENDEES**

**113**

**CITIES REPRESENTED BY ATTENDEES**

**574,188**

**OPENED EMAIL CAMPAIGNS**

# MASTERMIND (2/YEAR)

## Resource Partnership Details

A Mastermind Event is an invitation only, small group working session that brings together Lionsmark Capital leadership and select resource partners for confidential, high level collaboration, idea sharing, and problem solving. These sessions are designed to deepen relationships and generate practical insights through meaningful conversation, not presentations or sales pitches.

### 1 Host (Must Be a Financial Institution)

**\$3,500**

- Provides Lunch and Dinner
- Meeting Room Up to 40 People
- 2 Hours to Present
- Attendees Invited For You
- Up to 2 Attendees at the Symposium

### 3 Carrier Resource Partners

**\$4,500 PLUS Level 1 or Level 2 for the Annual Symposium**

- 1 Hour Panelist at the Mastermind to be Facilitated by Darren

Time	Agenda Item
8:30AM - 9:00AM	Registration
9:00AM - 9:15AM	Welcome & Introductions
9:15AM - 11:00AM	Financial Institution Overview & Model Review
11:00AM - 11:30AM	Financial Institution & Lionsmark Capital Q&A
11:30AM - 12:30PM	Lunch
12:30PM - 1:00PM	Lionsmark Capital Model Review
1:00PM - 1:45PM	Lionsmark Capital Presentation
2:00PM - 4:00PM	Mastermind Sessions
4:00PM - 5:00PM	Lionsmark Capital Presentation
6:30PM - 8:30PM	Dinner

*\*Example Mastermind Schedule*

# SYMPOSIUM (ANNUAL)

## Resource Partnership Details

A Symposium is a larger, structured educational event hosted by Lionsmark Capital that brings together advisors, clients, and resource partners for curated presentations, market insights, and strategic discussions. These events are designed to deliver thought leadership, foster connection, and provide broad visibility within the Lionsmark ecosystem.

### Level 1

**\$7,500**

- Logo on Conference Marketing Materials
- 2 Tickets for Attendees & Ability to Share Discount Code for Attendees to Register
- Ability to List Yourself as a Lionsmark Capital Resource Partner on Your LinkedIn Profile
- Panelist on General Session Stage or 25-Minute Presentation in a Breakout Room
- Provide 1 Item for Attendee Welcome Gift Bag
- Full Page Advertorial in Program Guide

### Level 2

**\$9,500**

- Logo on Conference Marketing Materials
- 2 Tickets for Attendees & Ability to Share Discount Code for Attendees to Register
- Ability to List Yourself as a Lionsmark Capital Resource Partner on Your LinkedIn Profile
- Presentation on General Session Stage or 45-Minute Presentation in a Breakout Room
- Provide 1 Item for Attendee Welcome Gift Bag
- Full Page Advertorial in Program Guide

# BUSINESS PLANNING WORKSHOP

## Resource Partnership Details

A Business Planning Workshop is a focused, hands-on session hosted by Lionsmark Capital that guides participants through strategic planning, goal setting, and execution priorities for the year ahead. These workshops are designed to produce clear direction, actionable plans, and alignment across leadership and advisory teams.

### **\$5,000**

- Welcome Reception Attendance (Up to 2)
- Host or Co-Host a Dine-Around for Up to 12 Attendees
  - Resource Partners are Responsible for Covering the Cost of the Dinner Itself, Along with any Transportation Expense for Their Group

# Calendar of Events

Date	Event	Location
Feb 2026	The Icon Effect Book Club Webinar Series	Online
Feb 10, 2026	Virtual Bootcamp	Online
March 2026	Mastermind	Chicago, IL
May 18, 2026	Annual Symposium	San Antonio, TX
June 17, 2026	Mastermind	TBD
Aug 11, 2026	Virtual Bootcamp	Online
Sep 30, 2026	Virtual Bootcamp	Online
Nov 5, 2026	Annual Business Planning Workshop	Orange, CA
Dec 8, 2026	Virtual Bootcamp	Online

# Sponsorship Confirmation

To digitally confirm your sponsorship and read our terms & conditions, please scan the QR code or click the button below.



[CONFIRM SPONSORSHIP](#)

**OR VISIT**

[LIONSMARKCAPITAL.COM/SPONSORSHIP](https://lionsmarkcapital.com/sponsorship)

# Our Team



## DARREN SUGIYAMA

### Founder and CEO

Prior to Lionsmark, Darren founded DaVinci Financial & Insurance Associates, a multi-office life insurance firm responsible for over 25% of Pacific Life's policy count in Orange County, California in 2017, and 39% of Penn Mutual's life insurance policy sales in the same county in 2019.

Prior to DaVinci, Darren founded Apex Outsourcing Insurance Services which became the #1 brokerage firm in the country with Kaiser Permanente, #1 in the country with Health Net, #2 in the state of California with Aetna, and #1 in Orange County, California with Blue Shield, concurrently.

Prior to Apex, Darren specialized in working with at-risk youths as the Director of a gang-prevention program in Long Beach, California and as a counselor in Halawa Prison in Honolulu, Hawaii.

Darren is the acclaimed author of *How I Built A \$37 Million Insurance Agency In Less Than 7 Years*, along with ten additional published books distributed internationally, including *Premium Financed Life Insurance - The Key To Effective Estate Tax Planning*, and is also a nationally acclaimed motivational speaker.

He holds a B.A. in Sociology from Loyola Marymount University, and a M.Ed. in Multicultural Education from the University of Hawaii at Manoa. Darren is married and currently lives with his wife and son in Orange County, California.

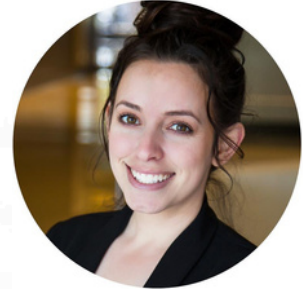
# Our Team



**EMILIA SUGIYAMA**  
Chief Operations  
Officer



**JEFFREY REID**  
Senior Business  
Development Consultant



**KELLY STONE**  
Director of Premium  
Financing Loans



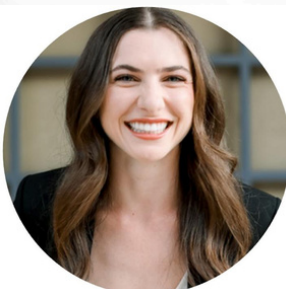
**MICHAEL PACHUTA**  
Director of Marketing



**LIONEL ADAMS**  
Senior Sales Associate



**COURTNEY PACHUTA**  
Director of Events



**KRISTEN GALELLO**  
Senior Event Manager



**JOEY CUSICK**  
Director of Accounting



**ABBEY STROM**  
Loan Renewal Specialist



**“The integrity of the people  
you partner with is more  
important than any product  
or company.”**

*Darren Sugiyama*

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**To secure your resource partnership or  
schedule a discovery please email  
[info@lionsmarkcapital.com](mailto:info@lionsmarkcapital.com) or call Michael  
Pachuta at 248-755-4012.**