Dennis Moseley-Williams

$10,000 to $15,000

Teaching Trust, Transparency and Engagement to Foster Closer Client Relationships

A certified expert in The Experience Economy, Dennis speaks to professionals and executives seeking real-world solutions that are both innovative and possible. He helps financial organizations reach, connect, and build sustainable positive relationships with their clients and desired communities through the integrated application of effective communication strategies and best business practices.

He is the author of Serious Shift: How Experience Delivery Can Save Your Practice, a guide book that examines how the experience economy can be adapted to the financial services industry. In his program, of the same name, Dennis examines the attributes and behaviors of Very Successful Advisors (VSAs), showing that the transition begins with changing – or shifting – one's attitudes and expectations in order to deliver client experiences that are consistent, memorable and meaningful. He addresses the obstacle of resistance to change and ways to overcome it so that your business becomes your art, not simply a job.

Video: The Experience Economy

David Clemenko

$5,000 to $10,000

Delivering a Disciplined Process to Make a Difference in Your Business and life

David Clemenko (SirCoach) understands the behaviors required to instill changes that lead to success. Drawing inspiration and experience from three key areas in his life, David delivers an unparalleled experience. He combines the tactical, results-driven enthusiasm of a Marine Corps Drill Instructor, knowledge of the best practices collected from advisors around the world, and expertise of the former Vice President of Marketing for Merrill Lynch.

David's programs specializes in helping advisors drive new business and build deeper, long lasting relationships with clients. His unique methods teach advisors simple, strategic, and actionable strategies to help sustain and nurture client relationships, market more effectively, and network with purpose. Using the time-tested SirCoach Method David strips your business down to its basic element and rebuilds it to be a structured, more efficient, profitable enterprise.

Video: The SirCoach Difference

Mark Zinder

$5,000 to $10,000

Helping Audiences Understand Market History, Investor Behavior & Financial Trends

Armed with unique insights and a keen understanding of macroeconomic trends that he learned from Sir John Templeton, Mark synthesizes ideas and energizes audiences with his trademark rapid-fire, fun-filled presentations. His insights on practice management and macroeconomics clarify investor needs and help establish you as the "adviser of choice". His distinctive and captivating style has made him one of the busiest and most requested speakers in the fields of finance, economics and business development. He possesses a unique gift for making the complicated clear.

In Mark's "Righting" Your Book: Doing Business the Way Your Clients Want Business Done, your audience will discover: How to develop a value proposition and set yourself apart from the competition; How to build a business, not just a "book"; How to develop an action plan to get your clients' financial house in order; How to become the advisor of choice

Video: Righting Your Book

Anthony Morris

$10,000 to $15,000

Delivering the Financial Tools You Need to Differentiate Yourself From the Pack

Anthony's creative marketing ideas & ability to deliver sets him apart. Advisors need the HOW behind client-building, not just the WHAT. They want to move past inspiration to application. His step-by-step process & tools are among the best you will find anywhere.

Anthony has spent the last 20 years engaged in the most intensive global search for the very best practical strategies to transform your business. Rather than empty inspiration or theory, he will equip you with immediately – transferable skills, templates, systems and techniques that are proving themselves in boosting our thousands of successful coaching client's production to the next level. Advisors describe his Top Advisor coaching program as having a dramatic impact on their immediate production and lasting influence on their business DNA.

Video: The 5 Star Client Experience

Bill Walton

$5,000 to $10,000

A Recognized Authority on Creating Greater Value in the Seller/Customer Interaction

For over 20 years Bill has been working directly with top producing Financial and Private Wealth Advisors and the asset managers to support their growth goals. He adds value to advisors in a way that un-blurs the lines of differentiation among them and their fiercest competitors. Bill helps financial advisors to not just prospect, but to find the time for more meaningful market outreach. His dual focus on time management and prospecting is driving a more dedicated effort to growth among the firms he supports.

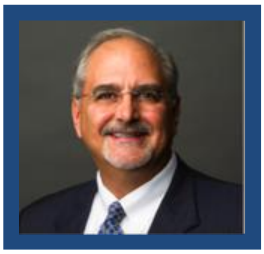
As a result of working with Bill, his clients can more easily: Identify the ideal client types that are best for them; Shape an approach strategy that uses all of their individual and firm resources; Create messaging that they love to tell and clients enjoy hearing; Design great meetings that always lead to "next"; Diagnose opportunities to truly know where they are in the sales cycle; Provide intelligent recommendations that are steeped in the clients real issues.

Video: Growth Strategies Workshop for Financial Professionals

Frank Maselli

$10,000 to $15,000

The Financial Industry's Premier Speaker! Delivering Modern Ideas & Actionable Take-Aways



Frank is one of the most inspiring and insightful leaders in the financial services industry. He is a recognized specialist in helping financial professionals reach new levels of success and he does it with tremendous warmth, humor and passion that have earned him Top Speaker awards at many national conferences. Frank talks to advisors from the heart about finding success and happiness in a hyper-competitive environment. He reaches professionals of all levels and leaves them with a deeper understanding of the critical role they play in their client's lives.

Franks' training program special are: High-impact: people do something immediately; Modern: these are fresh ideas that reflect today's issues and client attitudes; Relevant: the content comes from the real world challenges we face today; Fun: our delivery is engaging and passionate and entertaining.

Video: Frank Maselli Highlight Video