

## **BREAKOUT INFORMATION**

### **21<sup>st</sup> National Advisors Professional Development Conference Las Vegas, NV - Monday August 22 & Tuesday August 23, 2022**

You can earn up to an ADDITIONAL 6 CE credits by attending some of the Breakout presentations that we offer for you to gain valuable financial knowledge, further education and insight that will help YOU with the products and services that you provide.

As an additional bonus, you will be eligible to win \$500 USD. This draw will take place during the morning of Wednesday August 24, 2022 from the main stage.

Please register for **ONLY 1** breakout presentation during any time slot period. This means that you get to choose between Breakout #1 or #2, Breakout #3 or #4, Breakout #5 or #6, Breakout #7 or #8, Breakout #9 or #10, and Breakout #11 or #12.

## **BREAKOUT AGENDA FOR MONDAY AUGUST 22, 2022**

### **BREAKOUT # 1 FROM 1:30 PM – 2:20 PM in Florentine C/D (Main meeting room)**

**Attracting More HNW Clients with Estate Planning** – *Presented by Daniel Collison BA, CFP, TEP & Sponsored by Advice2Advisors*

#### **What will the advisor learn from this presentation?**

As Willie Sutton said when he was asked why he robbed banks, he said “Because that is where the money is.”

In this presentation financial advisors will learn how to use estate planning as a strategy to attract HNW clients, and not leave any money on the table and at the same time implement the estate planning process as an integral part of their comprehensive financial planning process.

#### **Presentation Overview**

One of the best ways to tap into the HNW market is through estate planning. But estate planning is so much more than death and taxes. It's about the emotions, the psychology, the family and, critically, the legacy.

In this workshop, Dan will cover the following: learning how to overcome client and prospect resistance to estate planning.

- mastering the *Disturb and Motivate* questions of estate planning.
- discovering how to implement the top-10 estate planning prospecting strategies.
- developing your estate planning webinar and seminar marketing strategy.

- mastering the "Estate Planning Process".
- gaining wealthier referrals and introductions.

***Please refer to Dan's bio listed in his main stage presentation.***

### **[BREAKOUT # 2 FROM 1:30 PM – 2:20 PM in Florentine B \(Room behind stage\)](#)**

**2 Unique Products that are ideal for 2 Specific Markets – Presented by Mike Amo  
FLMI & Sponsored by iA Financial Group**

#### **What will the advisor learn from this presentation?**

In this presentation, the advisor will learn how 2 IA hybrid products are ideal for 2 very different specific markets – the “Juvenile” and the “Elderly” markets.

#### **Presentation Overview**

Mike will demonstrate how approaching these markets will provide you with a sales focus that will assist you to become recognized as a “Creative Problem Solver.” More importantly the credibility you will gain from assisting these markets will prove to be valuable in the referral process.

By using these creative products, you will be able to carve out a niche for your marketing endeavours by using the products that you are licensed to sell.

You will learn how you can use these distinct products to penetrate 2 distinct market opportunities.

#### **Introducing Michael (Mike) Amo, FLMI - Director of Sales iA Financial Group**

Mike is in his 44th year in the Insurance Business. He started as a Head Office Underwriter for 9 years, moving to Product Development, Marketing and Agent Training.

After 11 years in the Various Head Office positions Mike entered the Field side of his career as an Advisor, moving to Sales Manager and Branch Manager. Mike has been an asset to the iA Sales and Marketing Team where he has held his current position as Director of Sales for the last 18 years.

Mike is the father of 4 Daughters and proud Poppa to 4 Grandchildren. The 4 Daughters explain his white hair and love of Wine!!

### **[BREAKOUT # 3 FROM 2:30 PM – 3:20 PM in Florentine C/D \(Main meeting room\)](#)**

**The Ultimate Guide to Plan, Market, Consult & Close with Your Clients & Prospects Live or Virtual – Presented by Simon Reilly & Sponsored by Leading Advisor Inc.**

## **What will the advisor learn from this presentation?**

In this presentation, the advisor will learn that a very important part of the financial planning process is to know their clients, by having a very effective fact find and needs analysis interview which is the first step in the financial and estate planning process.

They will also learn how human behaviors can dictate what insurance or investment products the client wants and will purchase from the advisor.

## **Presentation Overview**

An alarming study by Microsoft revealed that the human attention span had dropped down to just eight seconds, compared to twelve in 2000. With more and more content demanding attention in everyone's day-to-day, it can be challenging for financial advisors and insurance professionals to stay top of mind while competing with constant digital noise.

Before the technology boom, you could build awareness through a typical funnel that ultimately led to more sales. But now, consumers are impatient and are more likely to work with those who have gained their trust in the marketplace.

Achieving success in this economy requires the focus and development of a written plan that expands on winning marketing and sales strategies in the client commitment process, marketing plan, and top of mind systems.

Have you felt like your marketing has been a rollercoaster of inconsistent highs and lows with no real written plan guiding you?

Join Simon Reilly of Leading Advisor for The Ultimate Guide to Plan, Market, Prospect, Consult & Close - Live or Virtual to understand how to amplify your business through marketing and sales tactics in 2022.

## **Financial Advisors and Insurance Professionals can benefit from:**

- \* Understanding what buyers believe and experience in the sales environment to align your marketing tactics in a positive, informative strategy that brings business.
- \* A guide to developing a written plan for the client commitment process through people reading, a needs analysis interview process, questions to qualify, a way to guide your clients to the experience they want, and help your clients make the right choice.
- \* Marketing processes to attract prospects, referrals, and your client's adult children.
- \* Information on free marketing tools, content ideas, social media marketing management, and top-of-mind tricks for financial advisors and insurance professionals.

*“What not to do is just as important as learning what to do.” – Simon Reilly*

**Please refer to Simon’s bio listed in his main stage presentation.**

#### **[BREAKOUT # 4 FROM 2:30 PM – 3:20 PM in Florentine B \(Room behind stage\)](#)**

**The Solution to Financial Worries for Boomers, Millennials & Gen X Ers –**  
*Presented by Mike Danks CLU, AIIIC, EPC & Sponsored by Boompreneurs*

#### **What will the advisor learn from this presentation?**

In this presentation, the advisor will increase their knowledge for business insurance opportunities in this ever-changing demographic of our population.

They will also see that there is still an opportunity for the advisor to do the total financial planning package even when their clients and prospects retire. People are retiring earlier and looking at ways to fulfil their retirement years doing something they like to do.

Mike will show the advisor that maybe, starting a business is an option for their clients and prospects.

#### **Presentation Overview**

The solution to retirement is "Don't retire." Stop working and do what you always wanted to do. For millions of boomers, that means starting their own business, or becoming a Boompreneur. Owning a business is not for everyone, but neither is golf.

This presentation will show how to combine the skills of Boomers, Gen x ers and Millennials to provide a solution to make everyone happy and prosperous.

You as the Financial Advisor will be the coach which will result in happy clients, more business and new clients, Gen x ers and Millennials.

We will give you a step-by-step procedure to start the conversation and the tools to help the Boomer.

“Do it before someone else.”

**Please refer to Mike’s bio listed in his main stage presentation.**

#### **[BREAKOUT # 5 FROM 3:30 PM – 4:20 PM in Florentine C/D \(Main meeting room\)](#)**

**How To Capitalize on Your Clients Business Exits –** *Presented by Rod Burylo CIM, FCSI & Sponsored by Pinnacle Accounting & Finance*

### **What will the advisor learn from this presentation?**

When a client sells their business, the advisor can benefit by using many of the products that they are licensed to sell.

The advisor will realize that there are many estate planning opportunities for the client in this situation. Investment and retirement products are only a couple of products that the advisor can recommend and there are more.

### **Presentation Overview**

Short of winning a lottery, one of the biggest financial win-falls a client can experience results from the sale of a business. Looking forward, as baby boomers age and implement retirement and estate strategies, the number and value of business exits is expected to increase.

Advisors that assist with this process can also receive a win-fall. In this breakout, advisors will learn how to identify opportunities, coordinate resources, participate in, and benefit from their client's business exits.

*All breakout attendees will receive a one-hour complimentary consulting session for their clients valued at \$300.*

***Please refer to Rod's bio listed in his main stage presentation.***

### **[BREAKOUT # 6 FROM 3:30 PM – 4:20 PM in Florentine B \(Room behind stage\)](#)**

**#1 Non-Traditional Fastest Growing Employee Benefit in North America –**  
*Presented by Patricia Lapena. Sponsored by Legal Shield Canada & ID Shield Canada*

### **What will the advisor learn from this presentation?**

The advisor will see that this presentation will add another option to their suite of products that they currently offer their clients and prospects either on an individual or employee benefit basis.

This presentation will offer the advisor another way of offering a value added during the financial and estate planning process. This segment will provide a further way to ensure that the client and their families continue to do business with them for years to come.

### **Presentation Overview**

This presentation will focus on industry-leading products, keeping on the pulse of members issues, and their needs. Our services are timely, and more relevant today than any other time.

Patricia will show you how to provide a value-added service for your portfolio of products for you to discuss with your clients and products.

She will discuss how Legal plans and Identity Theft plans are available for individuals, families and as an employee benefit add on for businesses.

### ***Why is Legal Shield Important for an Individual or Family?***

Many advisors should consider this benefit as an option to assist their clients and prospect during the estate planning process.

#### You will discover the following during the Fact Find and Know Your Client Interview

- The clients do not have a will, nor do they understand the problems is they do not have one. If your client dies without a Will, their assets will have to go through the Probate process before being distributed to your family. That could mean years of delays and substantial taxes and fees.
- Many Canadians do not have a Power of Attorney that is necessary for them to be able to have their affairs taken care of when they can't look after them.
- More and more Canadians are creating Living Trusts to Protect their families as part of the estate plan for many reasons.
- Your clients and prospects might want to make their wishes known with an Advance Directive or Living Will. This is a very important legal document when it comes to making their wishes known regarding end-of-life decisions in advance in case they are ever unable to do so.
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This product can be the recommended solution for all the above problems at a fraction of the cost through conventional channels.

### ***Why is Legal Shield Important for the Business Owner as an Employee Benefit Add On?***

#### Has Your Client?

- Had to hire or fire an employee?  
Had a dispute with a vendor or customer?
- Needed a lawyer to draft a letter or make a call to resolve a legal issue for you?
- Needed a lawyer to review a contract and provide advice?
- Been worried about their business getting sued?

All the previous situations involve legal issues that can have serious consequences for your business if they are not handled correctly.

**This presentation will also cover all the Corporate Information for you**

- A brief history of this 50-year company – established in 1972
- Industry disruptive company that is changing the way people access the law
- A review of IDShield.
- Dedicated support for your business: we can partner with you for convenience with minimal learning curve
- Looking for partnerships
- Attractive long-term renewal income

## **Introducing Patricia Lapena**

Patricia is the Regional Manager of LegalShield. She heads up the broker division to provide LegalShield / IdentityShield as employee benefits, corporate plans, and Organizational groups. She has established a large presence in the Chamber of Commerce as a member benefit provider. Working with professionals is her expertise and where she has built a dynamic portfolio of referral-based relationships and has the diversity to adapt to several industry sales matrix.

Patricia has been a member of the South Surrey Chamber of Commerce for 5 years and now sits on the Board of Directors. She Chairs the Membership Committee and heads up the Ambassador program.

In addition to working on her very successful business, she is active in Sprint triathlons, travelling and the pursuit of a Personal Growth with such mentors like John Maxwell, Jack Canfield, Tony Robbins, and others.

## **BREAKOUT AGENDA FOR TUESDAY AUGUST 23, 2022**

### **BREAKOUT # 7 FROM 1:30 PM – 2:20 PM in Florentine C/D (Main meeting room)**

**Growing Your Business with the 20 Minute Coffee Meeting: Providing RESULTS Like You've Never Seen Before** – Presented by **Daniel Collison BA, CFP, TEP &** Sponsored by *Advice2Advisors*

#### **What will the advisor learn from this presentation?**

In this presentation the advisor will increase their knowledge as it pertains to the #1 step in the financial planning process and that is to learn about your clients and prospects before you recommend any solutions to the problems that you have discovered.

#### **Presentation Overview**

Prospects today want to know more about you and your services before they will commit to a full Discovery meeting. In this session, Daniel Collison will show you how to gain immediate credibility with "*The 4 Portfolios of Wealth Management*" within 20 minutes, leading to a fully motivated prospect.

In this workshop, financial advisors will learn how to:

- target your *Ideal Client* prospect with your 30 second "UVP Opener".
- ask the all-important questions to get your 20-minute coffee meeting.
- illustrate the integration of tax planning, asset management, debt management, and risk management . . . in 20 minutes.
- learn more about your prospects in 20 minutes than other advisors do in 2 hours.
- book more Discovery meetings that will stick and lead to new clients.
- stand out from your competition (their advisors) within 20 minutes.

**Please refer to Dan's bio listed in his main stage presentation**

**[BREAKOUT # 8 FROM 1:30 PM – 2:20 PM in Florentine B \(Room behind stage\)](#)**

**Canada Protection Plan, a Foresters Financial company eApp demo – InsuranceAssist** – *Presented by Ayal Alalouf BAS & Sponsored by Canada Protection Plan (a Foresters Financial Company)*

**What will the advisor learn from this presentation?**

In this presentation Ayal will walk the advisor through the application process, showing how simple it is and why it is important for the client or prospect to answer all the questions necessary to provide underwriting with the total picture.

This presentation will also cover the additional benefits that CPP offers the client and prospect when they buy a product from them.

**Presentation Overview**

This presentation will show advisors just how easy it is completing a Foresters application using InsuranceAssist.

Also, as a bonus, we will review the complimentary member benefits your clients will get just by owing a policy (\$10,000 in scholarships for children & grandchildren, \$10,000 in grants to help your community, free will & power of attorney documents, free online courses, and more!)

***Introducing Ayal Alalouf BAS***

Ayal got his start in the insurance industry in 2004 with Freedom 55 Financial. In 3 short years, he assisted 250 families (over 600 clients) with their insurance & investment needs. He moved on to Canada Protection Plan in 2006 as Senior Manager in their Call Centre, then in 2012 moved in the Regional Vice President role for Ontario.

Since 2020, Ayal supports advisors for all CPP & Foresters product lines.

Ayal enjoys sports (playing days are over, so he watches now), loves to spend time with his twin girls, and is always up for a poker game as has been playing for 30 years.

### **BREAKOUT # 9 FROM 2:30 PM – 3:20 PM in Florentine C/D (Main meeting room)**

**A Refreshing NEW Look at Living Benefits That Will Increase Your Book of Business in 2022** – Presented by Perry Wong CPA, CA & Sponsored by Juggernaut Financial

#### **What will the advisor learn from this presentation?**

This presentation will provide the advisor with some more knowledge in living benefits such as Accident and Sickness Insurance and Critical Illness Insurance using some case studies.

#### **Presentation Overview**

The current landscape of the Insurance Industry is very limited. There is a huge variety of Life Insurance products from many insurance providers. However, there is very few choices available to financial advisors in the Living Benefit landscape. Most advisors are not actively offering disability due to income qualification issues, long waiting periods and occupational rating and restrictions. Critical illness is primarily offered to young, healthy individuals with healthy family medical histories.

The choice of living benefits is limited. There is a real need for new and innovative living benefit products.

In this presentation, you will learn how to introduce new and unique Living Benefit solutions to your clients and prospects financial and estate planning process.

Perry will cover the following in this presentation:

#### *Accident and Sickness Insurance*

- No Income Proof: No job required for coverage
- No waiting periods
- Coverage to age 85
- No occupational restrictions
- Issue age: 6 months to age 69
- No medical required
- Sickness coverage available to individuals with PreExisting Conditions such as Kidney issues (Dialysis), Lupus, Crohn's, Epilepsy, Hepatitis, Sleep Apnea, Lyme Disease, etc.
- Family coverage available: Protecting existing and future children

#### *Daily Benefit Critical Illness Insurance*

- Level cost of insurance (extremely affordable, even for seniors)
- Lifetime coverage (issue age 18yrs to age 70)
- Multiple claims (not one time claims like traditional CI)
- Family coverage available: Protecting existing and future children.

#### *Critical Illness Insurance*

- Affordable Level Lifetime Coverage for individuals with Cancer or Survivors of Cancer
- Affordable Level Lifetime Coverage for individuals with a poor Family History, History of Heart Attacks, Stroke, Diabetes (insulin or non-insulin)
- Preferred rating for individuals even if there is pre-existing condition of Cancer, Stroke, Heart Attack or Diabetes

***Please refer to Perry's bio listed in his main stage presentation.***

#### **BREAKOUT # 10 FROM 2:30 PM – 3:20 PM in Florentine B (Room behind stage)**

**How to Earn Multiple Sources of Income from Your Clients - The Good, The Bad and The Ugly** – *Presented by Patricia Giankas & April Simpkins. Sponsored by Great Credit Solutions*

#### **What will the advisor learn from this presentation?**

In this presentation, the advisor will get ideas on how to assist their clients and prospects with increasing cash flow that can be used for the insurance products that they sell. This is a value added that will lead to more sales and less objections for the client and prospect to buy.

#### **Presentation Overview**

This presentation will give you an introduction to a lead generation platform built to produce multiple sources of income. At the end of the day, you will convert a previous C client to a B or even an A client while earning money along the way.

It is not a secret. We have been living in turbulent times over the past couple of years. Some of your clients and prospects have increased their credit capabilities to the point where they may not see light at the end of the tunnel.

As part of the Financial Planning process that you go through with your clients and prospects, you will get ideas and access to recommendations on how to set them up for financial success by partnering with Great Credit Solutions (GCS).

Great Credit Solutions are here to help them with their expertise on how to live a financially viable life without having future debt issues.

*Although we take much of this for granted, you can help your clients and prospects by reviewing the following points with them:*

- Do they need help in rebuilding or establishing their credit?
- Has their credit rating been affected by late payments, divorce, unemployment, or bankruptcy?
- Are they having a hard time renting an apartment, buying a car, or getting a mortgage? Or are they 'new to Canada' and have yet to establish a credit history?
- Do they need to learn about valuable budgeting skills that will help them SAVE money?

As a financial advisor you can act as their financial wellness coach and help them with all the above scenarios.

This correction in their debt load AND the freeing up of dollars, can lead to their well-funded financial and estate planning process that can include Life & Disability Insurance, LTC, CI, Investment and Retirement Planning.

When this is achieved, you can overcome the objection, "I can't afford it", or "I need to use my money for other things."

*Together with GCS as your resource, YOU CAN change your clients financial direction in life for the better!*

### **Introducing Patricia Giankas, Author, Credit Coach, Certified Bankruptcy, and Insolvency Counsellor**

*In Patricia's words* – "I perform a full needs analysis for my clients to determine where they are today and how we can help them in accomplishing their future goals."

"I work with clients who are having financial issues and need guidance on how to navigate thru these trying times, with an end result of being credit savvy and getting back into a happy place of understanding the credit arena and at the same time rebuild their self-confidence."

Patricia Giankas brings over 48 years of experience in the Financial Services industry; leveraging her expertise and know-how. She recognized the need for offering clients complete financial representation.

Patricia began her career at a major bank as a teller, moved to personal banker and rose to Branch Manager. After 14 years Patricia left the bank and moved as Manager to Beneficial Finance. In one year, she was honored as one of the top Managers within the company, with not one but two Leader of Distinction awards as a leading Manager and representative for the company.

After the sale of Beneficial & The Associates Corporation to CITI Financial, Patricia took her lending expertise and know-how, and founded Metrocap Mortgage Corporation in 2001 after seven years with Beneficial. Within a year she produced record gross revenues, and today, under her leadership, Centum Metrocap Mortgage Corp. is one of Canada's fastest growing mortgage brokerage companies. Centum Metrocap Mortgage Corp. was nominated for the Business Entrepreneur Award from the Scarborough Chamber of Commerce for two consecutive years. Centum Metrocap also received a few awards from the Toronto Residence in Partnership (T.R.I.P Awards).

Under her leadership, Patricia has launched several organizations in which true nonstop financial organization has been developed to service a client's needs.

In 2003 she introduced CreditXpert Canada Inc.; a company focused on education to bring out of control and challenged debt resolutions to their clients.

Following which, Patricia Giankas opened Met-Core Financial Ltd; a company dedicated to future building with Client centric programs. Patricia has also lectured at women shelters, namely Ernestine's Women's Shelter. She has provided and assisted community charities like The Caribbean Children Foundation and to the Sick Kids Foundation. She has also sent containers to Cuba, Dominican Republic, and St. Vincent, as well as adopted an orphanage home for the children in Georgetown, Guyana.

Patricia has built many software versions and has recently completed 2 apps to assist financial advisors to get multiple sources of income using an AI platform to do the heavy lifting for them.

Patricia has established a reputation as the true expert and leader in the mortgage industry and her community here in Toronto.

- Honest-Ed's acct payable clerk -7 years
- RBC manager -13 years
- Beneficial finance/associates -6 yes
- Mortgage broker- 22 years
- Bankruptcy/insolvency counsellor - 19 years
- Credit coaching -14 years

### **Introducing April Simpkins**

My career as a Financial Advisor and ultimately a business owner began to grow and protect security and wealth for my own family. As a mom, my family is my first passion, and that led to my passion for helping other families. Now, nearly two decades later, I have the honour and privilege of being welcomed into living rooms, board rooms and kitchens across Ontario where I get to provide people with valuable strategies, solutions, money-saving and money-making concepts!

As the need for this combination of expertise and heart grew, so did S.O.S Financial Group, ultimately developing into a full-service financial brokerage that helps hundreds of individuals, families, and businesses each year.

I am immeasurably proud of the team here at S.O.S. Their expertise, commitment, and integrity set them, and us, apart from other brokerages across Ontario. Combine that with a passion that matches my own and I am gratified to say that together we have built a corporate family that advises our clients and manages their financial needs with as much careful attention and dedication as we do for our own families.

Whether it be as a partner offering valuable products and services to our clients, as an Advisor or as a client yourself, I welcome you to the S.O.S family with open arms and very much look forward to working with you, and for you.

### **[BREAKOUT # 11 FROM 3:30 PM – 4:20 PM in Florentine C/D \(Main Meeting Room\)](#)**

#### **Clients in Danger – What Financial Planners Should Do Right Now!**

*Presented by Michael Cobb & Sponsored by ECI Developments Inc.*

#### **What will the advisor learn from this presentation?**

Financial advisors who are working with clients who live in an entirely different country for a portion of the year, can introduce a unique set of challenges for these people.

When you own a property outside of Canada, not only do you need to follow Canadian tax laws, but you'll also need to follow those of the country in which your property is located as those tax jurisdictions will want to know what you're up to in their country.

The advisor can provide a value-added service if they know some of this information, or if they know where to find it. This knowledge can enhance the financial & estate planning process by protecting what matters the most to their clients and prospects.

#### **Presentation Overview**

Did you know that 45% of Canadians plan to spend a month or more outside Canada every year? Many will buy property overseas. Some will get it right. Many won't and will lose tens or hundreds of thousands of dollars in the process.

You can help them get this international property purchase right the first time. Attend and see how with just a few minutes of your time, you can arm your clients with critical due diligence information and grow your business by providing real value to a larger set of potential clients and earning their trust too.

#### **Introducing Michael K. Cobb, Co-Founder & Chief Executive Officer**

At the height of a successful career in the computer industry, Mr. Cobb left to pursue more pioneering opportunities in the emerging real estate markets of Central America. In 1996, he and his business partner formed a company, Exotic Caye International, to provide loans to North Americans purchasing properties in Belize, Honduras and throughout the region.

As the need for capital outstripped the supply, the mortgage company was converted to an international bank under the jurisdiction of Belize. It continues to provide mortgage services but has expanded its services to encompass the full realm of financial products.

Mr. Cobb also saw the need for a regional real estate company that would serve the Baby Boomer consumer with a North American standard product for the next 2 decades. He led the group into real estate development and created a holding company for several properties including a resort on Ambergris Caye, Belize. In August of 2000, Exotic Caye purchased 3.5 miles of Pacific Beachfront property due west of Managua, Nicaragua. This master planned community hosts world class infrastructure, homes, and condominium units. In February of 2006, the ECI Development group acquired 1100 acres and 3km of coastline in Costa Rica, setting the stage for expansion into this popular market. Most recently they merged their Belize property with a much larger parcel and have begun to develop 200 condominiums units on Ambergris Caye, Belize.

Additionally, Michael has spoken at hundreds of international conferences about real estate financing and development. He has acted as a consultant to The Oxford Club and gives counsel to various real estate projects throughout Central America.

### **[BREAKOUT # 12 FROM 3:30 PM – 4:20 PM in Florentine B Room](#)**

**White Glove System for Growth + 7 Growth Hacks That Can Affect the Financial Planning Process with Your Clients** – *Presented by Carrie Ewart Hon BA & Dean Thurman. Presented by White Glove*

#### **What will the advisor learn from this presentation?**

In this presentation the advisor will learn about another effective financial planning option to market their services to their clients and prospects.

#### **Presentation Overview**

White Glove will explain the following:

- Exactly how they handle all the logistics, marketing, and up-front costs of educational seminars. Their webinar and in-person seminar programs allow advisors to keep their client pipeline growing and flowing without taking away their most valuable asset – their time.

- The biggest challenges advisors face when it comes to planning and hosting seminars – online or offline.
- How they eliminate those challenges, while shielding the advisor from the work and the financial risk.
- Their evolution to create a better “end-to-end” holistic approach to marketing by combining lead generation, social media, and email solutions to cover *all* bases from client acquisition to nurturing and brand development.
- Discuss real results that advisors in the trenches are seeing with their proven solutions!

PLUS Learn 7 Growth Hacks that a top financial advisor has implemented in his office and seen tremendous growth over the last 2-3 years, even through the pandemic!

1. Family Estate Organizer
2. Appointment Setter
3. Virtual Greeter
4. Red, Yellow, Green
5. Preview the Review
6. Client Appreciation Events
7. Any Marketing

### **Introducing Carrie Ewart Hon BA, Client Relations**

Carrie Ewart is a seasoned sales and finance professional who manages Client Relations and Market Development for White Glove. She started her career at Scotiabank in 2002.

She held numerous roles as a Financial Advisor in addition to roles in Small Business, Commercial Banking, and Global Banking and Markets.

Throughout Carrie’s career progression she has managed, coached, and motivated teams and individuals in the Finance industry.

Carrie attributes the success of her career to an ongoing commitment to learning, improving, and helping people become better off. Her 15+ years of experience have taught her a lot about what clients want from us.