

MEET & GREET

with RICHARD DOLAN



A VERY SPECIAL MEET N GREET BREAKOUT SESSION WITH RICHARD DOLAN IN THE MAIN MEETING ROOM

September 19, 2023 from 5:15 pm to 6:00 pm

"Best Practices For The New Financial Life Planning Conversation"

This presentation is sponsored by The Institute of Financial Life Professionals
This will be a continuation of his Main Stage presentation that will fill in all the blanks.

In this breakout, Richard will share the actual tools used in the NEW conversation about financial life planning that will include:

- The conversational playbook
- The personal assessments for clients
- The Financial Life Vault and
- NEW action plan.

What are people saying about Richard?

- "I appreciate Richard and the impact he makes in the world." - WILLIAM JEFFERSON CLINTON, 42nd President of The United States
- "Richard is a great coach because he cares about you." - MIKE TYSON Undisputed Heavyweight Champion of the World
- "Richard is brilliant at what he does." - OPRAH WINFREY, American Host & Philanthropist
- "Richard's approach to create and realize a LEGACY-based life is revolutionary." RICHARD BRANSON, Business Magnate, Investor, Author & Philanthropist

Richard will "Buy the First Round," (breakout attendees only please) as a thank you for attending the breakout. Additional drinks can be purchased if you wish to do so.

After the presentation, mingle at the meet n greet from 6:00 to 7:00 pm and then enjoy the Vegas nightlife.

You are also welcome to get a selfie with Richard and his 2020 Miami Heat NBA Championship Ring. One of 2 championship rings gifted to him by Juwan Howard coach of the Miami Heat, for his role as an advisor with the team.

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Additional Information You May Not Know About Richard Dolan... as found on www.richarddolan.com.

What do Bill Clinton, Mike Tyson and Oprah Winfrey have in common? Enter Richard “Richie” Dolan — a financial guru with a 30-year tenure in the private wealth and real estate industries, who raised over \$7 billion in assets, and is now hell-bent on mentoring others to secure a better financial future.

Dolan is currently the head of a boutique firm named Legacy, specializing in improving people’s relationships with money, wealth, and worth. However, he has one passion he is fanatical about; Richie wants to create one million, millionaires, by 2030 — read that again — which he believes is achievable through transforming our relationship with money, wealth and worth through assessment, education, planning and action.

Richie has toured the globe with four United States presidents and shared a stage with Oprah Winfrey, Michelle Obama, and Ellen DeGeneres.

Richard has been a founding member of various businesses in the wealth management and investment banking business. He’s served hundreds of clients and oversaw the management of nearly \$10B in client assets before migrating to the world of real estate investing. Richard served as President and partner to one of North America’s longest-running private real estate investment network group representing over 35,000 doors owned measuring over \$15B in value. He sold his share in the business after eight years in 2019 for an undisclosed amount.

In 2011 Richard met Juwan Howard, a member (and later coach) of the Miami Heat. This was a turning point, as Juwan introduced him to the world of professional sports and high-powered celebrity athletes including then fellow teammates, LeBron James, Chris Bosh and Dwayne Wade. This led to the launch of a private pension plan with Juwan Howard for fellow NBA players, specializing in real estate investments in pre-construction properties across North America. Juwan gifted Richie his two NBA championship rings he won with the Heat for his role as advisor during that time.

His focus now is to take this experience and share it through his education, programs, advisory services, and coaching. As the chief architect of an academic certificate program, “The Financial Life Professional,” Richie leads through lectures, coaching, and mentorship to show how to live a prosperous financial life. Drawing from research areas such as financial psychology, behavioral finance, investor resilience, and the “economics of happiness,” giving rise to his very own “urban financial philosophy.” A few stand out pieces of advice; when asked how he builds his teams, he replied it is best to “look for people that think and act like owners and are willing to stand for success over self-significance” — how to scale a business? Try “hiring people smarter than yourself.”

A self-described “financial leadership guy” with a desire to teach people the fundamentals of finance, blessed with unbridled business acumen, maybe his dream to create one million, millionaires, by 2030, isn't so outlandish after all.



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