



**Agenda, Speakers' Bios & Presentation Descriptions**  
**Start Time: 12am PST / 3am EST / 8am GMT**  
**End Time: 24 hours later**

<b>Advisor Notes</b>	<b>Date</b>	<b>Speaker</b>	<b>Presentation Title</b>	<b>Department</b>
	Mon. Jan 11	Jeremiah Desmarais	How to Turn LinkedIn into an Autopilot Lead Generation Machine	Social Networking
	Tue. Jan 12	Jamie Cornehlisen	How to Confidently Turn Your Practice into a Business	Operations
	Wed. Jan 13	Maria Marsala	How To Market Smarter: Choose a Niche & Work with Clients You Enjoy the Most	Marketing
	Thur. Jan 14	Alessandra Malito	How To Gain More Street Cred By Engaging With Reporters	Media
	Fri. Jan 15	Neal Quon	How To Evaluate and Choose the Right Financial Platform Technology for Your Practice	Technology
	Mon. Jan 18	Mary Ann Buchanan	How to Overcome The Buyer's Bias Phenomenon	Recruiting
	Tue. Jan 19	Sandy Schussel	How to Make Getting Great Referrals Easy	Sales
	Wed. Jan 20	Joel R. Beck	How To Avoid Regulatory Compliance Issues & Develop A Successful Succession Plan	Compliance
	Thur. Jan 21	Marlon Weems	How To Survive the Robo-Advisor Threat	Technology
	Fri. Jan 22	John Coyle	How To Apply Design Thinking to Individual and Team Strengths	Leadership
	Mon. Jan 25	Susan Power	How to Increase Workplace Productivity	Human Capital
	Tues. Jan 26	Maria Marsala	How to Use Creating Strategic Alliances as a Marketing Strategy	Marketing

*Sessions broadcast each day starting at 12am PST / 2am CST / 3am EST / 8am GMT.*

*Each session is available for replay "on demand" for 24 hours following original broadcast time.*



## Jeremiah Desmarais, Keynote Speaker

### How to Turn LinkedIn into an Autopilot Lead Generation Machine

In this dynamic session our speaker will show you award-winning, actionable and repeatable lead generation success formulas from his private client portfolio. Whether you're just getting started with digital marketing or an expert, you'll get simple 'here's how you do it' advice that has generated over 2M insurance and financial leads.

#### What we'll cover:

- How to turn LinkedIn into an autopilot lead generation machine
- How to use a little known 'private group' hack for unlimited leads in your area
- The single most important way to get affluent prospects to say 'Yes' 93% of the time to meet with you
- Ways to use our outsourcing technique so you do none of the work but reply with times you're able to meet

### Jeremiah Desmarais, Founder, Agency Growth Academy

Jeremiah helps financial advisors and insurance agents generate leads using digital marketing. He has been labeled "One of the greatest marketing minds in the insurance industry". His teachings have generated over 2M leads and over \$300M in commissions for over 100,000 agents in 51 countries.

Ranked as one of the Top 40 Direct Marketers Under 40, Jeremiah gave the TED Talk, *Democratization of Marketing*, to a standing ovation. He has trained top producers (agents making six and seven figures per month from some of the top FMOs, GAs, and carriers in the nation) on marketing, strategy and positioning.



## Jamie Cornehlisen, Presenter

### How to Confidently Turn Your Practice into a Business

Bogged down in the minutia? Tired of inefficiencies in your customer follow-up? When you've reached the limit of quality time you can spend working with clients, it's time to look for new answers. Learn about a few back office systems you can outsource that will help you focus more on your advising business.

#### What We'll Cover:

- How to refocus attention on matters that are core to the business
- How to spend time and money by elevating your primary value to clients
- How to promote yourself out of a job by delegating high-routine, highly repeatable processes



#### Jamie Cornehlisen, Founder, AUM in a Box

James (Jamie) B. Cornehlisen launched AUM in a Box in 2012 to meet the growing needs of fee-only financial advisors and provide them with the tools and resources to succeed in their businesses. A triathlete, Jamie tackles every project like he trains for his next race—meticulously focused on how to enhance strengths and minimize weaknesses.

Jamie builds process and procedures. In starting three different companies, Jamie has developed checklists and steps to transform a practice into a business. He creates successful game plans for financial advisors and entrepreneurs to reach their goals through thoughtful, actionable strategies.

Lucky enough to work with his wife, Betsy, Jamie is no amateur when it comes to successful businesses. Together with Betsy, he founded Capstone Investment Financial Group, LLC in 2001 and continues to serve as the organization's Managing Director.

A Chartered Financial Analyst®, Jamie is a member of the CFA® Society of Colorado and previously served as the organization's president. Jamie is also the co-author of *Conquering the Divide: How to Use Economic Indicators to Catch Stock Market Trends*.



## Maria Marsala, Presenter

### How to Market Smarter: Choose a Niche & Work with Clients You Enjoy the Most



Why should an individual seeking a financial advisor contact YOU? Why should your clients risk their reputation and REFER you? What makes you STAND OUT? If you answered, "Great customer service!" or "Experience!" your voice evaporated in a crowd of thousands. Wouldn't you like to be SOUGHT OUT by prospects instead of constantly chasing them?

If prospects aren't finding YOU, you are missing your niche. In this program, you'll learn how to differentiate yourself so that you become the OBVIOUS CHOICE for clients. You'll discover practical strategies for developing a niche that single you out as the "go-to" expert. Enjoy the benefits of HITTING YOUR NICHE.

#### What We'll Cover

- Common mistakes financial advisors make around niching
- 3 specific steps to help you identify the best niche for you and your firm
- The 4 four niches you don't want to choose (and why)

#### Maria Marsala, Business Strategist, former Wall Street Trader

Maria Marsala is a business advisor to financial advisors, award-winning coach, speaker, thought leader, and a former retail trader from Wall Street. Her company, Elevating Your Business, specializes in providing financial advisors with tools and support to reach their 2-year business and personal goals in 12 months (or less).

Maria's 35 years of business experience include running 3 businesses, managing a few nonprofits, and coaching hundreds of business owners in more than 40 industries. She helps her clients become more profitable, attract better clients, and have more quality free time.

Maria uses proprietary templates, workbooks, audios, webinars, and S.Y.S.T.E.M.S. – Save, Yourself, Time, Energy, Money and be more successful. Her clients also grow personally and professionally with the use of the Personal Foundation (Coach U) and the One Page Business Plan®. Maria offers do-it-yourself CDs and do-it-with-some-help group programs.

Maria's expertise has been featured in national publications such as *RIABiz*, *AdvisorOne*, *Entrepreneur Magazine*, *Forbes*, *The Huffington Post*, *Financial Planning*, and many more. She has authored 4 workbooks, including *Mastering Your Ideal Client Profile* and *Networking to Increase Your Net-Worth*. She publishes a complimentary online newsletter, FOCUS! which contains practical tips that turn financial practices into financial businesses.



## Alessandra Malito, Presenter

### How To Gain Street Cred By Engaging With Reporters



Have you ever wondered how some advisors end up quoted in the press and you're not? In this webinar, we'll walk you through various ways advisors get quoted in media outlets. You'll have a better chance of being quoted in magazines, newspapers, radio, TV, or on social media news sites.

#### What We'll Cover:

- Learn what pitches are and who you send them to in order to gain media exposure
- Learn about an online resource reporters use to find new experts to interview
- 5 ways to create relationships with reporters and news outlets (social media and public relations)

#### **Alessandra Malito, Tech Reporter, *InvestmentNews***

Alessandra Malito is the technology reporter at *InvestmentNews*. She covers advisor-facing software and hardware, social media, websites and other online services, and emerging technologies such as robo-advisors and data aggregation.

Alessandra started working for professional publications when she was 15 years old at a local community paper. She received her Bachelor's from SUNY Stony Brook in May 2013 and her Master's, with a concentration in business journalism, from CUNY Graduate School of Journalism in December 2014.

The summer before graduation from grad school she was an intern at *InvestmentNews*. Her byline has also been featured in *The Wall Street Journal*, *The New York Times* Lens blog, NBCNews.com and Newsday.com. She's currently taking continuing education classes for a Certificate in Finance and Accounting. When she's not writing up stories or thinking about technology, she enjoys cooking, crafting and running. There is never a coffee cup too far away.



## Neal Quon, Presenter

### How To Evaluate and Choose the Right Financial Platform Technology for Your Practice

Financial planning is in the midst of being disrupted much like Uber is impacting the taxi industry. Financial planning is no longer just goals checklists and calculations – it is a comprehensive platform that can consider portfolio holdings and classifications, everyday cash flow, life goals, and tax considerations.

Not only are the traditional leading planning tools evolving, but a new crop of solutions possibly more attuned to the modern investor and client are gaining traction. Evaluating these solutions AND matching them to how you work and the needs of your clients is critical.



#### What We'll Cover:

- The current financial planning tech landscape
- How planning is changing – both the tech process and the emerging millennial investor
- Proper due diligence – the basics plus specifically how to match a planning platform to your business model

#### Neal Quon, Co-Founder and Chief Executive Officer

Neal Quon began his career in the financial services industry in 1997 and is a graduate of Texas Tech University with a Bachelor of Sciences degree in Family Financial Planning. Being an independent advisor gives Neal an understanding of the challenges financial advisors face when selecting the tools to best meet the needs of their clients. He helped establish the technology for a Texas-based Registered Investment Advisor as he also built his initial book of business.

Neal also bridged many channels in financial services, with a consistent focus on front office operations. He has worked and consulted for many of the industry's leading service providers. This includes Albridge Solutions and CashEdge, Inc. Neal also directly coached financial advisors, serving as the Practice Consulting Manager for the Pacific Life group of broker dealers prior to their sale to LPL.

As co-founder of QuonWarrene with Blane Warrene, he brings client-facing technology expertise and regularly speaks and advises on practice management issues. Neal also serves on the advisory boards of Chapman University and Texas Tech University.



## Mary Ann Buchanan, Presenter

### How to Overcome The Buyer's Bias Phenomenon



There is an inescapable truth that exists in the advisory community: an overwhelming majority of advisory firms want to buy another firm. Their desire to grow inorganically is the same, whether they have \$2 billion, \$200 million or \$25 million of assets under management. Where does this desire come from? We like to refer to it as the “Buyer’s Bias,” which is comprised of a series of factors that support the notion that, along with being human, advisors are vulnerable to human biases.

#### What We’ll Cover:

- The goals and trends within the RIA Match database
- Four biases that shape advisors’ behavior
- Systematic ways to overcome biases in order to make good decisions about the sale, purchase, or merger of your firm

#### Mary Ann Buchanan, CEO and Founder, RIA Match

Mary Ann Buchanan has over 30 years of experience in the wealth management industry in senior management roles. She began her career building a successful advisory practice. Mary Ann has worked on both advisor and institutional levels in business development and relationship management for over two decades. She specializes in providing insights and answers to advisors and firms as they address the challenges of growth and succession.

Mary Ann launched the RIA Match platform in 2012 and just recently introduced Concierge Consulting, services to provide advisors greater efficiency in succession planning, growth and NextGen recruiting. RIA Match has over 2,300 subscribers from 49 states that manage in excess of \$250 billion of AUM.

Mary Ann provides thought leadership on overcoming the human biases that play a role in the approach to succession planning and M&A in the advisory community. We know that biases are inevitable; however, there are systematic ways to overcome them and to make good decisions about the sale, purchase or merger of a firm.

Ms. Buchanan has been quoted in *The Wall Street Journal*, *InvestmentNews*, *Financial-planning.com*, *Financial Advisor IQ* and *RIAbiz*. She has authored articles in *WealthManagement.com*, *OnWallStreet.com* and *InvestmentNews*. She participates in industry panels and presents to industry associations, custodians, and independent advisory groups. Mary Ann holds her BA in Economics from the University of Michigan.



## Sandy Schussel, Presenter

### How to Make Getting Great Referrals Easy



great referrals

Even the most experienced advisors will admit that asking for and getting great referrals is one of their biggest challenges. Either they won't ask, or they ask only once in awhile, or they ask and find they get poor results. Focusing on 10 distinct tips, this presentation will address ways to make referral conversations easier and results significantly better.

#### What We'll Cover:

- A better way to think about referrals
- More comfortable ways to get into the referral discussion
- How to significantly increase the likelihood of receiving

### Sandy Schussel, Master Coach, Sandy Schussel LLC

For the past 15 years, Sandy Schussel has been coaching successful financial and insurance professionals whose business growth has slowed or is out of control.

Sandy was a successful but unhappy attorney who nearly lost his life to cancer and decided to change careers. After transitioning into the financial/insurance field, Sandy eventually became the National Sales Training Director for First Investors (now Foresters Financial). He spent hundreds of hours in the field with advisors at all levels and studied what works for the most successful ones.

While maintaining an Outside Business Activity as a sales and leadership coach for other professionals and developing top quality sales training for his company, Sandy observed that—like his outside clients—many of the advisors who became stuck and frustrated didn't need more training. They needed to get past their fears and limiting beliefs to take action on what they already knew how to do. So, he instituted a program to coach more successful advisors inside the company. Four years ago, he began coaching advisors, planners, and other producers independently.

Along the way, Sandy published two highly-acclaimed books, *The High Diving Board*, about overcoming fear, and *Become a Client Magnet*, about attracting and keeping clients. Both are available on his website and on Amazon.



## Joel R. Beck, Presenter

### How To Avoid Regulatory Compliance Issues & Develop A Successful Succession Plan



In this presentation, attorney Joel Beck of The Beck Law Firm, LLC will highlight practical steps financial advisors can take to help them avoid regulatory or compliance problems, including some of the more common violations charged against financial advisors in the investment adviser business. Joel will also discuss essential terms to consider when succession planning for an advisor's business. Whether buying or selling a book of business, an advisor can work to maximize value of the business, ensure a smoother transition, and avoid legal disputes—achieving success in succession planning.

#### What We'll Cover:

- Avoiding the common regulatory violations committed by financial advisors
- Developing basic internal controls/procedures to help reduce client disputes and lawsuits
- Practical legal considerations for buying or selling a financial advisor's book of business (succession planning strategies)

#### Joel R. Beck, Managing Attorney, The Beck Law Firm, LLC

Joel Beck founded The Beck Law Firm, LLC in 2007, after a ten-year career at NASD (n/k/a FINRA). At NASD, Joel worked in various roles as an examiner, paralegal and, after graduating from law school, as an enforcement attorney. At NASD, he developed extensive compliance and regulatory experience in the broker-dealer industry.

In private practice, Joel's clients include broker-dealers and investment adviser firms and their financial advisor representatives. Joel often counsels financial advisors on career transitions and firm start-ups, compliance and legal issues relating to RIA and B/D businesses, and regulatory matters involving the SEC, FINRA, or state securities commissioners. His experience as a regulator helps him provide practical guidance to clients.

In addition to its financial markets legal practice, The Beck Law Firm, LLC also represents clients in the areas of general business legal needs, including commercial litigation, as well as with estate planning needs.



## Marlon Weems, Presenter

### How To Survive the Robo-Advisor Threat

Automated investment managers, also known as robo-advisors, are changing the wealth management industry. They have capitalized on the rise of social media and mobile technology to reach the overlooked millennial class. Human advisors, large and small, must come up with ways to adapt to the threat.



#### What We'll Cover:

- What are the factors contributing to the rise of robo-advisors?
- How do these drivers relate to emergence of robo-advisors?
- How do robo-advisors compare/compete with traditional brokers?
- How are traditional brokers responding?
- What are the potential negatives for robo-advisors?

#### Marlon Weems, Founder, Hillcrest Strategies

Marlon Weems is the founder of Hillcrest Strategies, a Wilmington-based consulting and advisory firm. During a career in financial services that spans more than thirty years, he has developed expertise encompassing fintech (financial technology) algorithmic trading, market structure, and social media strategy. He has held leadership positions at several boutique investment banking firms in investment advisory, sales and trading, and regulatory compliance. During this time, he held series 3, 7, 24, 52, 53, 55, 63, and 65 securities licenses.

He has authored research covering wealth management, social media, and global market structure including: *Robo-Advisors vs. Traditional Advisors: The Battle for the Hearts and Minds of Investors*; *Electronic Trading Outlook for Brazil: Trading Faster, Trading Smarter*; *The Transformative OMS: From Tickets & Timestamps to Today's Technologies*; and *The Art of Noise: Harnessing the Power of Social Media with Smart Analytics*.



## John Coyle, Presenter

### How to Apply Design Thinking to Individual and Team Strengths



Consider the adage “the definition of insanity is doing the same thing over and over again and expecting different results.” Through the metaphor of sport, learn how individuals and teams can use a design thinking-driven approach to identify and leverage their unique strengths (and design around weaknesses) in order to achieve breakthrough performance. John will share how he used design thinking to break out of a rut and achieve world record-breaking performance and a silver medal from the Olympics.

#### What We’ll Cover

- Learn how to identify, understand, and accept unique strengths (and how they relate to weaknesses) in order to decide what to focus on, and what to delegate, team up on, or outsource
- Understand how to use principles from “*design thinking*” to deliberately design lives, careers, and teams maximizing native strengths in order to achieve breakthrough performance.
- Learn how to design around individual weaknesses and create higher engagement and greater collaboration with your teams and colleagues by leveraging their diverse strengths.

### John Coyle, Founder, The Art of Really Living

John K. Coyle is the Founder of The Art of Really Living, an Olympic Silver Medalist, Stanford School grad, Kellogg MBA, NBC sports analyst, Professor of Innovation, author and speaker.

John is an innovation expert who has applied design thinking to personal development, teams, and cultures as well as our most important commodity: time. John helps people design strength-focused and resilient lives that empower people to find meaning in their work and their lives and in so doing create memorable time expanding experiences. A thought leader in the field of horology (the study of time) John is an expert on how to slow, stop and reverse the perceived acceleration of time.

John has delivered two TEDx talks, was the lead-off keynote speaker for Chicago Ideas Week – Edison Talks, and has been featured on WGN radio, Fast Company, and Innovation Excellence.



## **Susan Power, Presenter**

### **How to Effectively**

This workshop answers the question: “*What are the biggest drivers of workplace productivity?*” We’ll focus on what levers organizations have to substantially increase their team’s productivity. A summary of Higher Talent’s extensive research on industry leading practices and key influencing drivers of workplace productivity will be shared.

#### **What We’ll Cover:**

- Winning actions to create skyrocketing employee productivity and engagement
- Laser focused actions to address workplace productivity killers
- Executive summary of our research findings on the most impactful productivity practices to maximize human capital ROI

#### **Susan Power, Owner & CEO, Higher Talent Inc.**

With 15+ years of experience in the human resources field, Susan is known for her ability to create compelling cultures that inspire trust and productivity in the workplace. As founder and CEO of Higher Talent Inc., Susan’s firm services organizations in both Canada and the United States.

Susan built her consulting skills at the global consulting firm Accenture where she worked internationally across 50 countries consulting organizations across industry and sector. She has extensive experience working on projects in the area of organizational design, compensation design and analysis, and human resources policy.

Susan is a regular contributor to industry leading human resources publications across North America. She is an instructor at the Gardiner Center at Memorial University in Canada.

Susan has worked on major change management initiatives up to the senior executive and board level, and is known for her professionalism and ability to consistently deliver top quality work.

Susan is the proud recipient of the Newfoundland & Labrador Organization for Women Entrepreneurs (NLOWE) Start-Up Award (2013) presented by the Newfoundland & Labrador Credit Union. She has an MBA from the University of Calgary, and is a Certified Human Resources Leader (CHRL).



## Maria Marsala, Presenter

### How to Build Your Firm Using Strategic Partnerships

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#### What We'll Cover

- Common mistakes financial advisors make around niching

#### Maria Marsala, Business Strategist, former Wall Street Trader

Maria Marsala is a business advisor to financial advisors, award-winning coach, speaker, thought leader, and a former retail trader from Wall Street. Her company, Elevating Your Business, specializes in providing financial advisors with tools and support to reach their 2-year business and personal goals in 12 months (or less).

Maria's 35 years of business experience include running 3 businesses, managing a few nonprofits, and coaching hundreds of business owners in more than 40 industries. She helps her clients become more profitable, attract better clients, and have more quality free time.

Maria uses proprietary templates, workbooks, audios, webinars, and S.Y.S.T.E.M.S. – Save, Yourself, Time, Energy, Money and be more successful. Her clients also grow personally and professionally with the use of the Personal Foundation (Coach U) and the One Page Business Plan®. Maria offers do-it-yourself CDs and do-it-with-some-help group programs.

Maria's expertise has been featured in national publications such as *RIABiz*, *AdvisorOne*, *Entrepreneur Magazine*, *Forbes*, *The Huffington Post*, *Financial Planning*, and many more. She has authored 4 workbooks, including *Mastering Your Ideal Client Profile* and *Networking to Increase Your Net-Worth*. She publishes a complimentary online newsletter, FOCUS! which contains practical tips that turn financial practices into financial businesses