Attend Our 90-Minute Event

Step Up and Be Different

You can work less and earn more. Our Difference will positively affect your profitability. It doesn't matter if you are new to the profession, or a seasoned veteran. We can increase your ROI as well as your ROL (Return on Life™).

The Difference is Process . . . Process is the key. You can benefit from Process because it is the critical element that increases profitability in wealth management. Marketing, knowledge and technology are important, but not enough. They must be linked into a single comprehensive process. You will learn how our award-winning Wealth Enhancement Process® is the guidance system for your practice. It works. Advisors who use the Wealth Enhancement Process® report outstanding results.

This 90-Minute Event delivers important principles and easy-to-implement methods distilled from our 2.5-Day Wealth Enhancement Process® Workshop. Highlights of the 90-Minute Event follow.

- Find out how advisors who use the Wealth Enhancement Process® doubled, or tripled their revenues on a consistent basis
- Create meaningful client development processes that result in profitable meetings between you, your prospects and your clients
- Discover how to have prospects and current clients, engage you to provide solutions
- Develop a moneymaking process out of compliance drudgery. See how something as simple as an Investment Policy Statement can lead to increased investment assets
- Discover how to capture 100% of your clients' investable assets
- Learn how to create insurance "prescriptions" that your clients take to solve problems
- Deploy simple mechanisms to generate the right volumes of the right referrals

Wealth Enhancement Process® Rationale

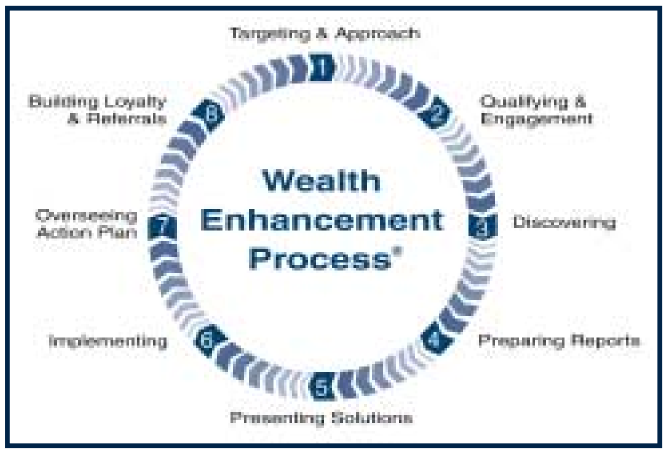
Solve Your Clients' Problems

Advisors who solve their clients' problems will be rewarded. Academic and industry studies & analysis prove that a robust wealth management platform is the best way to serve your clients.

The Wealth Enhancement Process® will:

- Increase assets under administration and insurance implementation;
- Cement client loyalty; and
- Create raving referrals and clients for life.

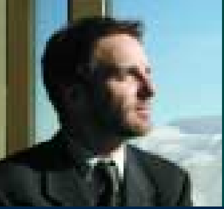
We provide a simple wealth management model that helps advisors do just that. We deliver the *Process, Knowledge, Tools & Technology* to create a Wealth Enhancement Practice™.



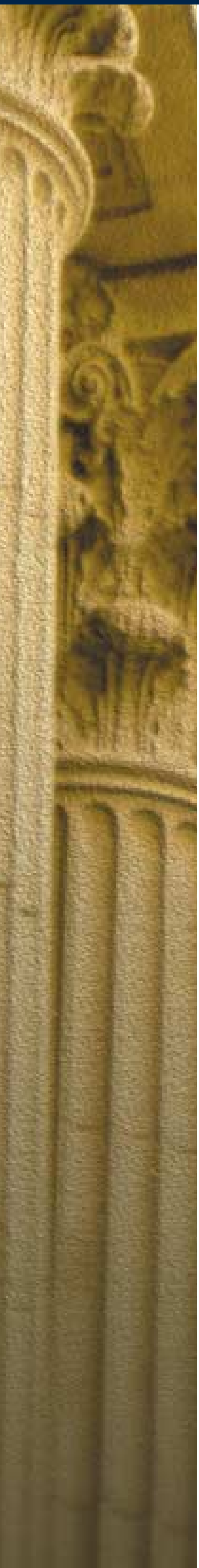
An Award-Winning Process Designed To Drive Your Business

The *Wealth Enhancement Process®* was pioneered by successful, fee & commission planners. It is used daily as the key point of differentiation in a profession that is fast becoming a commodity. The results are truly stunning. This client-centric approach delivers a high level of client satisfaction that rewards the advisor with increased business. Advisors can learn to double or triple their revenues on a consistent basis. There is tangible proof that the Wealth Enhancement Process® works.

The Wealth Enhancement Process® can be fully integrated into your branch or practice. You might have excellent training or processes in some, or all of the 8 steps. However real life experience shows that not everyone has integrated all 8 into a fully functioning Wealth Enhancement Process®. This program is designed to show you how to link them into a single comprehensive process.



2.5-Day Wealth Enhancement Process® Workshop Details



Learning "How To Do It"

Most seminars tell you what to do. The Wealth Enhancement Process® workshop teaches advisors to understand "what to do" and specifically "how to do it" to enhance their clients' well being through wealth enhancement. Moreover, advisors learn how to start becoming the chief financial officer in their clients' lives: the trusted advisor to whom clients turn when there is any financial decision within their family. This is the Wealth Enhancement Process® workshop.

We know that tools (knowledge, technology, marketing tactics) by themselves provide little value. Critical to success is taking what you have learned and turning it into a process that will provide a very high level of service that your clients will value. The Wealth Enhancement Process® workshop helps you do just that.

Each segment of the program has specific objectives and action plan, which allow you to put your new knowledge to work quickly. There is also extensive reference to supplementary reading materials or Web resources to provide each participant with greater in-depth knowledge.

Built on Adult Learning Principles

Real life experiences are related during the modules to create a better learning environment. Action plans and checklists support the learning experience. This provides direct application into your practice and creates discussions based on real situations.

The workshop follows the Wealth Enhancement Process® and is built on the following foundation:

1 Understanding and improving your Wealth Enhancement Measure™;
2 Presenting your services: Defining service levels that clients value;
3 Targeting and Approach: Finding the method that works for you;
4 Qualifying and Engagement: Learn how to have clients engage you to provide service;
5 Discovering: How to encourage clients to tell you what you need to know;
6 Preparing Reports: Learning what clients value in financial planning;
7 Presenting Solutions: How to ensure all your recommendations are implemented;
8 Implementing: Motivating clients to act;
9 Overseeing the Action Plan: Learn to build action plans that drive your revenues up;
10 Building Loyalty and Referrals: How to create a constant flow of qualified referrals; and
11 The Practice Model: Building the practice model that increases your ROI and ROL (Return On Life™).

The 2.5-Day Wealth Enhancement Process® Workshop is designed by financial advisory professionals, for financial advisory professionals. It is totally unique, and will change the way you do business.

Sincerely,
Wealth Enhancement Academy Inc.

Wealth Enhancement Process®
90-Minute Event

Designed For Forward-Thinking Advisors

11 Key Benefits of the Wealth Enhancement Process®

1. Boost your revenues from all sources: fees, assets, insurance
2. Examine methods of fully conditioning prospects to engage you . . . and get paid for it
3. See how to turn compliance drudgery into a valuable service
4. Find out how to screen prospects to identify the ones who will become great clients . . . and not waste your time with "do-it-yourselfers"
5. Learn how to create "prescriptions" that your clients take to solve problems
6. See how you can get referrals without asking
7. Master a process to get clients to look forward to your valuable advice. . . and getting 100% implementation
8. Provide comprehensive wealth management for your clients without spending hours and hours behind a computer screen
9. Learn how you could transform your practice to fee-based, without taking a drop in income, if that is your goal
10. Leverage the power of the Internet by bringing Web-enabled financial planning to your desktop
11. See how to turn your Web site into a powerful business building asset (if you have one)

The Wealth Enhancement Process® is an eight step model. The 2.5-Day Workshop is a full agenda that delves into each of the eight steps.

Substitution of speakers and content changes may occur at any time.

Who Should Attend The 90-Minute Event

- Insurance advisors who are working towards a larger investment asset base
- Mutual fund advisors who endeavour to increase their insurance revenues
- All independent advisors who want to enhance their fee revenue
- Brokers who exercise their own entrepreneurial style
- Associate advisors & financial planning assistants who look to increase practice efficiency
- Company Presidents, Managing Directors and Partners of dealers, financial planning firms, and managing general agencies
- Functional heads of sales, marketing, compliance, and human resources. Also branch managers, national sales and marketing managers

FIND OUT MORE ABOUT THE EVENT NEAREST YOU!

Register and find out more about the Events and Workshops at www.wealthenhancement.ca.

CE Credits are earned through the 90-Minute Event.

Branch and resource centre presentations for groups of 25 or more advisors are available. Branch managers and business owners can arrange on-site events by emailing masser@wealthenhancement.ca.

Wealth Enhancement Academy