2018 NAPFA Pre-Conference Session
RUNNING A SUCCESSFUL CLIENT ADVISORY BOARD

October 15, 2018 | 10am – 4pm | Sheraton Philadelphia Downtown

Learn everything you need to know to form and benefit from a successful client advisory board – from the man who has led more client advisory board meetings than anyone in the financial services industry.

Stephen Wershing, CFP®, has been helping financial advisory firms create and utilize client advisory boards as a business building strategy for over 7 years. By the end of this one-day program, you will have a complete and thoughtful plan to make your client advisory board a reality (or make a bigger success of the one you already have!).

Stephen Wershing, CFP
President, The Client Driven Practice

Here's what you will learn:

1. What a board can do for you (and what it can't)
2. How to choose the right participants for your board
3. How to invite prospective board members so they will accept
4. Creating an effective board meeting agenda
5. Choosing a venue – what restaurants won't tell you
6. Choosing the right person to run your meetings
7. How to follow-up the board meetings
8. Upgrading the client experience with your board's guidance
9. Leveraging your advisory board in your marketing
10. Finalizing your action plan and planning timeline

Bonus – Special Guest!

Marie Swift of Impact Communications, will discuss:

1.Ways to "mine" your advisory board for marketing ideas and validation
2.PR opportunities from your board
3.How the board's feedback can guide your messaging strategy
4.Utilizing your board members as brand advocates and torchbearers

Register today!

NAPFA member price $197 | Non-member price $249

For additional information contact Support@TheClientDrivenPractice.com, 585-381-2662

THE CLIENT DRIVEN PRACTICE

Ready to sign up? Register here: NAPFA.advisoryboard.solutions

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Your Workshop Leaders

Stephen Wershing, CFP®

President, The Client Driven Practice

Stephen Wershing, CFP® is President of The Client Driven Practice, a firm that coaches financial advisors how to clarify their value, build their brand, and attract more referrals. Veres calls Steve "the best marketing mind in financial planning." His book, Stop Asking for Referrals: A Revolutionary New Strategy for Building a Financial Service Business that Sells Itself (find it here: http://amzn.to/2dlfnTd) was published by McGraw Hill in 2012.

Wershing is known for his work with client advisory boards. He has conducted well over 100 boards and has authored articles and workshops about advisory board success strategies. His firm has helped more advisory firms organize and run their advisory boards than any firm in the nation.

Steve started as a registered rep 30 years ago, becoming a fee based advisor and later into a broker dealer executive. He was Chief Operating Officer of a national firm and subsequently President of a regional B/D before dedicating himself to coaching advisors full time in 2011.

Marie Swift

Chief Executive, Impact Communications

Marie Swift is President and CEO of Impact Communications, a full-service marketing communications firm serving a select group of independent financial advisors and allied institutions. Impact Communications works solely within the financial services industry. The firm has two service lines – one for highly-successful independent advisors and one for the institutions that support independent advisors.

A thought leader for thought leaders, she is known for bringing some of the industry's best and brightest voices together for dialog and debate. Her Thought Leader Roundtable series, which can be found at www.AdvisorThinkTank.com, is just one example of how Marie generates interesting conversations with movers and shakers in the financial services industry. Her Best Practices in the Financial Services Industry blog, which can be found at www.MarieSwift.com, provides additional insights and advice, including podcasts, articles, videos and other helpful content for independent financial advisors and the institutions that serve them.

Prior to establishing her own marketing communications firm in 1993, she served as Director of Corporate Communications for Worldwide Investment Network in Irvine, California, where she helped FNIC's then #1 Top Producer attain and maintain that title for five consecutive years. She managed a staff of twenty that supported two-dozen successful registered representatives, estate planners and wealth managers.

DON'T MISS OUT!
Lunch is included
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