2-DAY FINANCIAL ADVISOR BOOT CAMP

Are you ready to take your practice to the next level?

This is the industry's highest level 2-day session for financial advisors who are serious about their practice. Since 1988, we have been helping financial advisors increase their revenue. Through our 2-Day Financial Advisor Boot Camps, we have helped thousands of financial advisors sharpen every aspect of their financial planning practice and approach.

APFA
ACADEMY OF PREFERRED FINANCIAL ADVISORS
Partnering with the Industry's Best Advisors

OCTOBER 18-19
LOS ANGELES, CA

Learn specific strategies on how to increase your revenue and operate more efficiently

---

WORKSHOP LEADERS:

KEN UNGER,
PRESIDENT

TOM GAU,
CPA, CFP®

PRESENTED BY:

THE ACADEMY OF PREFERRED FINANCIAL ADVISORS

(866) 866-0472

www.theapfa.com
info@theapfa.com

If you're out there every day "in the trenches," battling for business, you probably keep running into these major issues:

- ✓ *Do you consistently attract high net worth prospects?*
- ✓ *Do you consistently close prospects?*
- ✓ *Do you retain all of your clients in today's difficult environment?*
- ✓ *Do you have the time to meet with clients and prospects while managing the details of your practice?*
- ✓ *Do you have systems that maximize your efficiency, allowing you to work smarter, not harder (and less)?*
- ✓ *Do you have a multi-million dollar system?*

At the 2-Day Financial Advisor Boot Camp, we will show you the tools that will help you say "yes" to these critical questions and show you how to deliver more value in just two weeks than most other financial planners offer in an entire year!

All attendees will learn very powerful, time-tested systems and ideas, including:

- ✓ *Immediate changes you can make to dramatically increase your revenue.*
- ✓ *Proven techniques to increase your assets under management.*
- ✓ *The secrets of maximizing referral generation.*
- ✓ *Ways to consistently get in front of more qualified, high net worth prospects.*
- ✓ *Time-tested tips for retaining existing clients.*
- ✓ *How to hold efficient and effective meetings with both prospects and clients.*
- ✓ *Systems to increase both your efficiency and your effectiveness.*
- ✓ *Organizational techniques that will maximize the productivity of your entire office.*

"After attending your Boot Camp, I immediately implemented some of the tools and had my best quarter ever! This Boot Camp is a must for advisors who want to run a high-level practice!"

"I have been to several other boot camps and I can unequivocally say that this was time well spent. I went away with several tangible items that I will implement immediately. Tom and Ken are absolutely the real deal!"

"As a million-dollar producer myself, I was pleased to see how to best run a million-dollar practice from start to finish! Kudos to Ken and Tom for showing me how to elevate my practice to the next level!"

2-day Financial Advisor Boot Camp Agenda

Thursday

8:00 a.m. - 8:30 a.m. **Introduction**

8:30 a.m. - 10:00 a.m. **Where do YOU Start? (Develop the Million Dollar Producer "Mind –Set")**

10:00 a.m. – 10:15a.m. **Break**

10:15 a.m. - 12:00 p.m. **Mastering Time Management and Organizing Your Office (Spend Your Work Time with Clients and Prospects!)**

12:00 p.m. - 1:00 p.m. **Lunch**

1:00 p.m. - 2:30 p.m. **How to Develop Your Multi-touch Marketing System to Develop a PIPELINE of Prospects! (Generate More High Net Worth Leads Than You Ever Thought Possible!)**

2:30 p.m. - 2:45 p.m. **Break**

2:45 p.m. - 4:30 p.m. **Specific Marketing Techniques That Top Producers Use! (Get Ready To Generate More Business Than YOU Can Handle!!)**

4:30 p.m. - 5:00 p.m. **Open Question & Answers (Your Chance to Ask Additional Questions)**

Friday

8:00 a.m. - 8:30 a.m. **Day 2-- Welcome and Overview (How to Stay at a High Revenue Level)**

8:30 a.m. - 10:30 a.m. **Initial Client Interview (Learn How to Uncover and Capture ALL of the Prospects Assets!)**

10:30 a.m. - 10:45 a.m. **Break**

10:45 a.m. - 12:00 p.m. **"The Master" Reveals His Best Closing Techniques (Learn HOW Tom Produced at The Highest Levels Possible!)**

12:00 p.m. - 1:00 p.m. **Lunch**

1:00 p.m. - 2:00 p.m. **Answering the Toughest Objections (So the Client Asks YOU To Be Their Advisor)**

2:00 p.m. - 3:00 p.m. **How to Implement What You've Learned (Formal Wrap Up and Close of Boot Camp)**

Your Workshop Leaders:

Ken Unger, a 35-year veteran, is the industry's most respected and experienced coach/trainer of high-level producers. Over the past 20 years, Ken has helped and directly coached more million dollar practices than anyone else in our industry. Ken is consistently hired by major firms to train their top producers.

Tom Gau, CPA, CFP, in 2014 sold his practice, which generated revenue of over $3,000,000 annually for over 20+ years. Tom has won numerous accolades available to financial advisors, including consistently being one of the "Top 100 Independent Financial Advisors" in *Barron's* and *Registered Representative.*

Registration Form

Please fax or email completed form to (916) 780-0645 or info@theapfa.com

Today's Date:	
First Name:	Last Name:
Company:	Broker/Dealer:
Address:	
City:	State, Zip:
Phone:	Fax:
Email:	
How did you learn about our Boot Camp?	

Payment Information:

"I hereby apply for acceptance into The Academy of Preferred Financial Advisors (APFA) 2-Day Financial Advisor Boot Camp. In doing so, I commit myself to full participation in the program. I acknowledge that all of my decisions and actions and the consequence of such decisions and actions, whether made in the context of this program or not, are entirely my own responsibility. I enclose the non-refundable registration fee. I am aware that my registration fee is non-refundable. I understand that it is my responsibility to handle my own travel and travel-related expenses and that the sessions are set and have no make-up date. In the event of an emergency, APFA reserves the right to re-schedule and/or substitute the session."

I, ____, hereby authorize the APFA, to charge the credit card account number below in the amount of $______________

OCTOBER 18-19, 2018
WESTIN LAX
LOS ANGELES, CA

____
Name on Card Date

____
Signature

Credit Card #: ____ Expiration Date: ____________

Billing Address: ____

Participants are responsible for paying for and booking their own hotel and travel plans. Hotel booking link provided at sign up.

Toll free: (866) 866-0472 Website: www.theapfa.com Email: info@theapfa.com

Tuition:

Full Price: $2,499

Tuition is for materials and session only. Attendees are responsible for their own travel and hotel costs.
Hotel link to book your room will be provided at sign up.

For more information please call (866) 866-0472
or visit our website at www.theapfa.com