

Building an Exceedingly Profitable Multi-Million Dollar Advisory Practice

An Exclusive One-Day Workshop
Presented by Russ Alan Prince, Richard J. Flynn,
Mitch Gitter and Frank Seneco

John Hancock

MUTUAL FUNDS



SEPTEMBER 9, 2008 • THE OFFICES OF ROTHSTEIN KASS, NEW YORK CITY

Based on the critically-acclaimed book, *The Middle-Class Millionaire*,
this workshop will provide powerful research on building a highly profitable practice.

This workshop—designed by the foremost expert on private wealth and the best practices of the Elite 1200, Russ Alan Prince—will focus on the mind set, processes and tools that will allow you to better serve your clients and enable you to build an exceedingly profitable multi-million dollar advisory practice. Based on the methodology that is Millionaire's Intelligence, we will address the concepts and provide you with the tools to take your advisory practice to a higher level and significantly increase your income.

This event is designed for advisors who have a meaningful book of business and have the desire try new concepts and tools in order to better serve your clients and earn a substantially greater income.

Who should attend:

- Advisors wanting to eventually have jet-set money by better serving the affluent.
- Wealth managers wanting to refine and improve their practices.
- Advisors wanting to expand their practices to become more successful with the wealthy.
- Senior managers responsible for their firm's success in the high-net-worth marketplace.

Registration Cost:

- \$450 for the first person from an organization.
- \$350 for each additional person from the same organization.

Additional Materials provided:

- *The Middle-Class Millionaire: The Rise of the New Rich and How They are Changing America* by Russ Alan Prince & Lewis Schiff
- *Wealth Management: The New Business Model for Financial Advisors* by Russ Alan Prince & Hannah Shaw Grove
- *High-Net-Worth Psychology: Finding, Winning & Keeping Affluent Investors* by Russ Alan Prince & Karen Maru File
- *Fame & Fortune: Maximizing Celebrity Wealth* by Russ Alan Prince, Hannah Shaw Grove & Richard J. Flynn

All attendees receive a three-month subscription to *Cultivating the Affluent*, the monthly source of intelligence for succeeding in the high-net-worth market.

For more information or to register contact Steve Kimball
at 732.450.8866 ext. 29 or skimball@fa-mag.com.

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Agenda

9:00 – 9:15	Introductions	12:00 – 1:00	Lunch Personal Security for the Wealthy <i>Guest Presenter: Mitch Gitter</i> <ul style="list-style-type: none">• How is personal security “value-added” for the wealthy?• What are the components to high-end personal security?• How do you incorporate this service into your practice?
9:15 – 10:00	Making Millionaire’s Intelligence Work for You <ul style="list-style-type: none">• What is Millionaire’s Intelligence?• What does it operationally mean to be client-focused?• How do you become centered?	1:00 – 1:45	The Secret: The Whole Client Model <ul style="list-style-type: none">• How can you best develop a deep understanding of your affluent clients?• Why is being centered so important?• How do you capitalize on immediate opportunities?
10:00 – 10:15	Break	1:45 – 2:00	Break
10:15 – 10:45	Putting Yourself in the Line of Money <ul style="list-style-type: none">• Who is your clientele?• What are your business model choices?• How do you make informed decisions by “running the numbers?”	2:00 – 3:00	Using The Whole Client Model <i>Guest Presenter: Frank Seneco</i> <ul style="list-style-type: none">• How do you get started?• Which affluent clients are best?• How do you set up your own “War Room?”
10:45 – 11:15	Insights on the Wealthy <ul style="list-style-type: none">• What is the size and scope of the affluent market?• What are their key concerns?• How does this information benefit your bottom line?	3:00 – 4:00	Scaling Up Your Clientele <ul style="list-style-type: none">• How can you source wealthier clients?• What are the key obstacles to getting more affluent clients?• How do you create strategic partnerships?
11:15 – 12:00	The Role of Advanced Planning in Working with the Wealthy <ul style="list-style-type: none">• What is advanced planning?• How does advanced planning enable you to differentiate yourself from your competition?• How do you work with an advanced planner?	4:00 – 4:30	Millionaire’s Intelligence Revisited <ul style="list-style-type: none">• Summary and Conclusions

Hosted By

Rothstein Kass

1350 Avenue of the Americas, New York, NY 10019 • 10th Floor

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*Please Note: Items marked with the * symbol are required to process your registration.*

*First Name: _____

*Last Name: _____

*Title: _____

*Company: _____

*Address 1: _____

*Address 2: _____

*City: _____

*State: Zip: _____

*Phone: Fax: _____

Email: _____

Payment Information:

American Express

MasterCard

VISA

Discover

Name on card: _____

Card Number: _____

Expiration Date: _____

Billing address of your card: _____

Signature: _____