DON CONNELLY + ASSOCIATES

Keynote Speeches

Training & Marketing Solutions

for

Investment Product Distributors

Wealth Management Firms

Financial Advisors & Consultants

"Be Brilliant at the Basics"

CAPTIVATE ~ EDUCATE ~ MOTIVATE ~ INSPIRE ~ COMPEL

At Don Connelly & Associates we understand that top performance doesn't happen by accident, rather by careful design. Our Founder & CEO, Don Connelly, has long been an inspiring partner, trainer, advocate and mentor to thousands of Financial Professionals. With a career spanning more than 45 years in the Financial Services industry, Don Connelly is a beacon of wisdom, authority and common sense. All of the services, training and programs offered through Don Connelly & Associates are designed to be compelling, easily implemented and results driven. All are designed to help Financial Professionals and their companies become more successful and thus, more profitable.

1. ON-SITE EVENTS that inspire your audience

SEMINARS • KEYNOTES • PRESENTATIONS • BREAKOUT SESSIONS • WORKSHOPS

Dynamic ~ Thought-provoking ~ Compelling ~ Memorable ~ Motivational

Utilizing Don Connelly as part of your company's on-site events and training allows your team to experience and learn from Don firsthand. Don's powerful and compelling live presentations are the culmination of keen insights he's learned throughout his career. All live presentations are presented with his classic passion and dynamic energy and peppered with ideas that are thought-provoking and easily implemented, as well as ideas that inspire, motivate and challenge participants to achieve greater success. Whether your company is a large Wealth Management Firm, an Investment or Insurance Product Distributor or a smaller Independent Firm, Don will connect with your target audience like few others can.

2. ON-LINE TRAINING that develops practice management & soft skills

LIVE, ON-LINE CLINICS • WEBINARS • CUSTOM DVD'S / CD'S •WEEKLY FOCUS • PODCASTS

Easily Implemented ~ Inspiring ~ Challenging ~ Results Driven

Experience has shown that the greater exposure Advisors have to practical tools, training and ideas that can be immediately implemented, the faster they take their practice to a new level. We are proud to offer a lineup of training and services structured to improve your bottom line. If you are a Wealth Management Firm, your Advisors will reap the rewards of greater productivity and profitability. If you are an Investment or Insurance Product Distribution Company, you will reap the rewards of having your home office and wholesalers build more successful relationships with your Key Accounts.

3. DON CONNELLY 24/7 is an industry-leading, online learning center

SUBSCRIBERS • ACTION PLANS • NEWSLETTERS • PODCASTS •COACHING •ONLINE PORTAL

Engaging ~ Learning ~ Mentoring ~ Coaching ~ Becoming Brilliant ~ Igniting

DON CONNELLY 24/7 (www.donconnelly247.com) is an extraordinary training and learning center offering timeless and practical ideas to thousands of financial professionals 24/7. Offering **ongoing live webinars; a Weekly Focus Action plan & Tools of the Trade podcasts; a Monthly Newsletter; access to hundreds of recorded audio and video podcasts;** access to **AskDON**, an informal coaching program; a new **Virtual Accountability Coaching Program** and much more, this learning center subscription program is one of the best ways for Advisors to hone their skills and to learn conversational competence.

4. COACHING PROGRAMS to get and keep you on track

VIRTUAL ACCOUNTABILITY PARTNER PROGRAM • ASK DON COACHING PROGRAM

VIRTUAL ACCOUNTABILITY PARTNER (VAP)

*DON CONNELLY & ASSOCIATES & EVOKING EXCELLENCE have teamed up to provide a **Virtual Accountability Program (VAP)** combining leading-edge technology tools with a highly accessible one-on-one coaching process. The **Virtual Accountability Partner** Program provides continuity for learning, change and growth at any time from any place.*

Perfect for **Advisors, Wholesalers or Managers**, participants are provided with a robust on-line **Accountability Partner Portal** that allows them to set their own goals and subsequent action plans, due dates and tracking metrics; allows them access to easily communicate with their coach whenever it is convenient for them; and helps to measure their results through the metrics **they** establish. Brief communication is encouraged daily, with weekly follow-ups and check-in. The **Virtual Accountability Partner** program is designed to help professionals tap into their full potential by providing them with an accountability partner and a proven method of accountability coaching.

ASKDON COACHING PROGRAM

Investment & Insurance Product Distributors, Wealth Management Firms and Financial Advisors alike can now have access to Don for private consulting sessions. This coaching service allows Advisors, Managers and CEO's to have 60 minute coaching sessions with Don to discuss challenges, business decisions or anything they'd like to discuss with Don.

5. PERFORMANCE TOOLS @ THE DON CONNELLY 24/7 STORE

CD'S • WEBINAR REPLAYS • POWER POINT PRESENTATIONS • 'DON WITH' REPLAYS

Financial Advisors, Product Wholesalers and Managers from around the globe enjoy Don's practical tools, insights and ideas. With clients in Australia, New Zealand, the United Kingdom, Asia, Canada and the US, Don's timeless ideas and dynamic style resonate with all. Go to www.donconnelly247.com/store for more details and to order CD's and other performance products.

Note: Customized/Private Label CD and DVD recordings are available by quote

CD'S AVAILABLE IN THE **DON CONNELLY** 24/7STORE

"Best of Don Connelly" Vol I

"Best of Don Connelly" Vol II: Meet Gator

"Best of Camp Connelly" Vol I

"Best of Camp Connelly" Vol II

****"Distinctly Different: Ya Gotta Stand Out"***

****"Simple Truths for Investors: Wisdom and Insight for a 45 year financial industry veteran"***

****"Say it So it Makes a Difference" (two CD set)***

**These CD's match the title of a keynote/workshop*

Note: Quantity discounts are available upon request

KEYNOTE, SEMINAR & WORKSHOP TOPICS

*Don's dynamic and compelling **On-Site Events** and **Ongoing Training Opportunities** give Advisors the practical tools and ideas that will make an immediate impact on their success. Don is a master at training Advisors on how to attract clients and strengthen client relationships; and providing Advisors with the immediate tools they need to grow their practices. From full-day workshops to 60-90 minute keynote presentations, the following are popular presentations that can be delivered as a keynote, seminar or workshop. **All can be delivered live, on-site or live, on-line.***

"BE BRILLIANT AT THE BASICS" - A REPEATABLE PROCESS FOR PEAK PERFORMANCE

In every walk of life, the star performers have a dependable and repeatable process that allows them to compete at the highest level under all types of pressure. This is true of star athletes, star surgeons, star dog trainers or star Financial Advisors and Wholesalers. Every profession has stars and every star has perfected his or her craft over a long period of time.

Goal Setting ~ Mission Statements ~ Business Planning ~ Marketing Plans ~ Prospecting ~ Getting the Appointment ~ The Presentation ~ Story Telling ~ Closing ~ Referrals ~ Perpetuating the Relationship ~ Character Development

"DISTINCTLY DIFFERENT: YA GOTTA STAND OUT"!

The Financial Services industry has become commoditized today like never before. All firms and all Advisors and Wholesalers pursue the same business with the same successes and the same failures. Wealth Management Firms and Investment Product Distributors are now more alike than different. It is difficult to become successful when you are doing exactly what everyone else is doing. Being different is more important than ever. And it's not hard skills that separate Advisors and Wholesalers from the crowd. It's soft skills. It's not IQ. It's EQ.

Relationship Building ~ Self-management ~ Story telling ~ Verbal skills ~ Soft skills ~ Exceptional Client Service ~ Branding ~ Marketing Oneself ~ Becoming Referable

"SAY IT SO IT MAKES A DIFFERENCE"

To be successful in this business, Advisors and Wholesalers must be effective communicators - not just when explaining complex subject matter, but also when telling their own personal stories. Financial Professionals must learn to use stories to demonstrate their values, to overcome objections and to provide a vision of the long term reward that lies down the road – be it for Advisors or their clients. Participants will take away six different types of stories that are essential for becoming a master communicator as well as learning powerful stories and analogies that will help clarify their message.

Effective Communication ~ Stories and analogies ~ Power phrases ~ Building trust ~ Confidence ~ Persuasion skills

“GETTING CLIENTS OFF THE FENCE”: THE GREATEST INVESTING STORY EVER TOLD

Advisors must continually get clients to focus on their goals regardless of market, economic or political turmoil, if they are to become effective advocates. Advisors love to hear this great presentation.

Focusing Clients on Goals ~ Motivating Clients ~ Effective Communication ~ Story Telling ~ The Litany of Disaster

“SIMPLE TRUTHS FOR INVESTORS” (A DYNAMIC CLIENT SEMINAR)

Given all the turmoil in the markets, what should prudent people do to achieve their financial goals be they retirement, educating their children or minimizing their taxes? Don shares wisdom, insights and stories and more than 45 years of observations about the perils of investing and, even scarier, the perils of not investing.

Things every Client should Know ~ Focusing on Long Term Goals ~ Pitfalls to Avoid ~ The Litany of Disaster

“THE ALZHEIMER’S TSUNAMI: PREPARING FOR THE WORST” (CLIENTS OR ADVISORS)

Note: This Workshop/Keynote is delivered by a 30-year Financial Industry Veteran who is also the Chairman Emeritus of the Dallas Chapter of the Alzheimer’s Association.

Advisors must understand the process for recognizing and working with clients who have diminished mental capacity. The Alzheimer’s tsunami is affecting more and more clients and their families. Understanding how to recognize Alzheimer’s Disease, how to protect your clients, your practice and your firm is of utmost importance.

What is Alzheimer’s Disease ~ Facts about the Disease and how Families are Affected ~ The Costs and Needs associated with Alzheimer’s ~ How to Recognize the warning signs of diminished capacity ~ A Step-by-Step Process on How to Help Families Prepare Financially ~ How to Protect your Practice and your Firm

FEE SCHEDULE

SPEAKING EVENTS for Financial Advisors, Managers, Wholesalers & Investors

• KEYNOTE SESSIONS	$ 8,500 plus travel expenses
• KEYNOTE + BREAK OUT SESSION	$11,000 plus travel expenses
• TERRITORY TRAVEL WITH WHOLESALERS	$11,000 plus travel expenses
• LIVE, ON-SITE WORKSHOPS*	$11,000 – $14,000 plus travel expenses
• LIVE, ON-LINE WORKSHOPS*	Available by quote
• LIVE WEBINARS	$ 3,500
• LIVE CONFERENCE CALLS	$ 2,500

**Pricing is contingent upon the length of the Workshop which ranges between two hours & full day sessions. Pricing includes up to 50 Participant Workshop Guides per session. Pricing for the Alzheimer's keynote or breakout session is priced separately from this Fee Schedule. Please contact us for pricing on the Alzheimer's program.*

PRIVATE LABEL/CUSTOM SERVICES

• PERSONALIZED CD'S & DVD'S	Available by quote
• AUDIO/VIDEO DRIP PROGRAMS	Available by quote

SUBSCRIPTION SERVICES

• DON CONNELLY 24/7*	Individual: $249/yr or $74.75/qtr
• WEEKLY FOCUS	$99/yr

*Corp licenses upon request

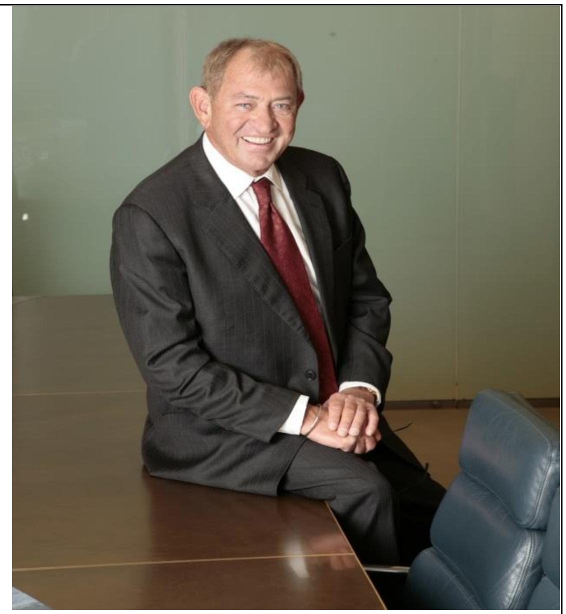
COACHING PROGRAMS

• VIRTUAL ACCOUNTABILITY PARTNER	$225 -$400/month (3 month program)
• ASKDON COACHING/CONSULTING	$395/60-minute session

Travel Expenses are invoiced separately.

Retainers and bundled services: Workshop series, multiple events & bundled services qualify for retainer/pricing adjustments

ABOUT DON CONNELLY



Don Connelly is perhaps the financial industry's most successful speaker, storyteller, motivator and mentor to financial professionals.

His career on Wall Street spans more than 45 years and includes positions as a stock broker, financial planner, branch manager, wholesaler, national sales manager and for nearly 19 years, company spokesperson, Senior V. P. and Senior Marketing Officer for an internationally renowned money management firm.

Don has lectured to tens of thousands of investors and financial services professionals in large cities, small towns, boardrooms, and universities. Audiences at England's Cambridge University, Harvard, Wharton School of Business, Chapman College and Pepperdine have all benefited from his presentations. He's shared his wisdom with Investment professionals abroad in New Zealand, Australia, Spain, Canada, England, Ireland and South Korea. In the past few years, he has given several presentations to the prestigious Million Dollar Roundtable as both a main platform and workshop speaker.

As founder and CEO of **DON CONNELLY 24/7**(www.donconnelly247.com), Don's timely and provocative sales ideas are offered through an extraordinary learning center and mentoring program available to financial professionals 24/7. Don is a guru on managing client relationships and inspires Financial Advisors to achieve greater accomplishments. He educates, entertains and motivates audiences with an extraordinary flair and fast-paced combination of wit and intellect utilizing compelling storytelling and anecdotes. A seasoned professional, he continues to earn standing ovations and top evaluations from his audiences wherever he speaks.

CONTACT US FOR DETAILS:

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