WORKSHOP & KEYNOTE GUIDE

Workshops conducted live,

On-Site or On-Line

CAPTIVATE YOUR TEAM

MOTIVATE THEM TO BELIEVE

INSPIRE THEM TO SUCCEED

COMPEL THEM TO ACT

"Be Brilliant at the Basics"

DON CONNELLY + ASSOCIATES

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. **Workshops are conducted live, on-site or on-line.**

ON-SITE EVENTS that inspire your audience

SEMINARS • KEYNOTES • CLIENT EVENTS • BREAKOUT SESSIONS • WORKSHOPS

Dynamic ~ Thought-provoking ~ Compelling ~ Memorable ~ Motivational

I 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.

KEYNOTE, SEMINAR & WORKSHOP TOPICS

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.

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

N 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"!

S The Financial Services industry has become commoditized today like never before. All firms, 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”

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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

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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)

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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” (ADVISOR OR CLIENT)

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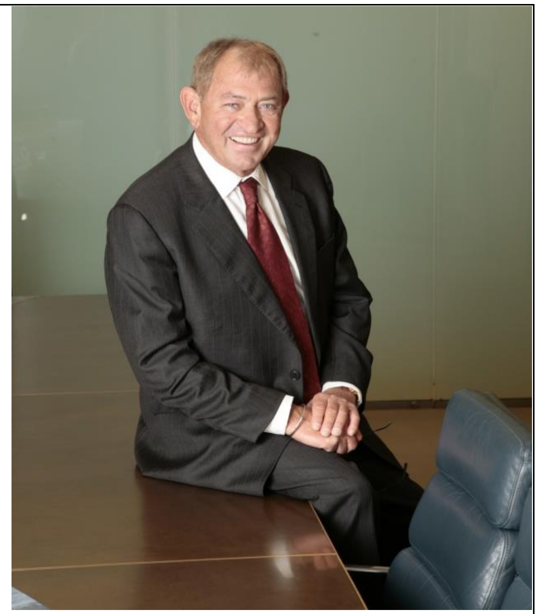
Note: This Workshop & Keynote is conducted by a 30-year Financial Services veteran who is also the Chairman Emeritus of the Dallas Chapter of the Alzheimer’s Association.

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. This is a great presentation for client events, too.

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

ABOUT DON CONNELLY

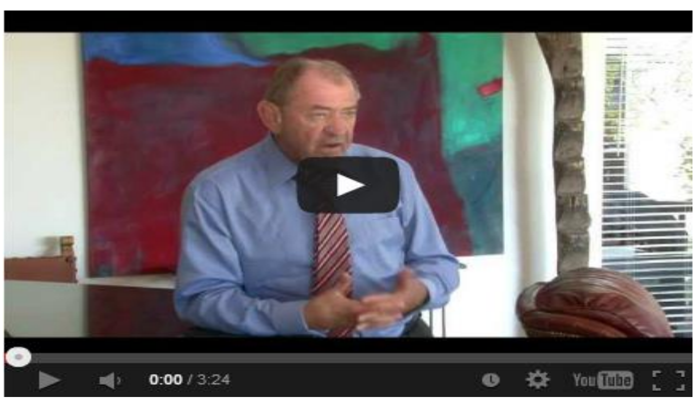


Don Connelly is perhaps the financial industry's most successful speaker, storyteller, motivator and mentor to financial professionals.

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 company spokesperson, Senior V. P. and Senior Marketing Officer for an internationally renowned money management firm and most recently, CEO and Founder, Don Connelly & Associates LLC.

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.



http://www.youtube.com/watch?v=v3MJRTC0uuY

CAPTIVATE ~ MOTIVATE ~ INSPIRE ~ COMPEL

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