

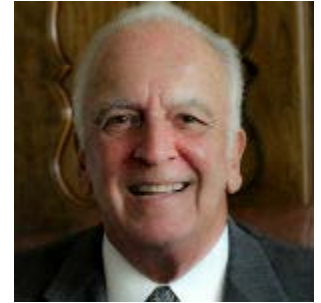
Don Connelly & Richard Capalbo – How to Excel in the Securities Business

Ninety Years of Experience & Insight: What Elite Advisors Do that Average Advisors Don't Do



If you are only going to attend *one* event this year, this should be it!

In 7 segments Don Connelly & Richard Capalbo will show you:



How to Excel in the Securities Business

1. HOW TO SPEND 75% OF YOUR TIME DOING THE FEW THINGS THAT MAKE A DIFFERENCE IN YOUR SUCCESS

In this segment Don and Richard discuss:

- how the most successful Advisors always spend the majority of their time doing things that correlate specifically to their success;
- why it's crucial for your success in the securities industry to constantly add to the knowledge you have about your clients and their families.

You will learn:

- the necessary skills to understand what is important to each client;
- the rules of engagement and understanding your clients;
- how to exceed client expectations.

2. HOW TO CREATE A REPEATABLE PROCESS TO KEEP YOU ALIGNED AND REACH YOUR GOALS

In this segment, Don and Richard discuss:

- why doing things more than once does not necessarily equate to a repeatable process with a predictable outcome;

For further information and to reserve a date for your annual meetings,
email info@donconnelly.com or call: 941.346.1166

Don Connelly & Richard Capalbo – How to Excel in the Securities Business

- what a repeatable process really means;
- best practices of a repeatable process from Don's and Richard's experiences.

You will learn:

- how to perform an action and produce an outcome virtually an infinite number of times with a predictable level of quality each time;
 - how to create your repeatable process and document it properly.
-

3. HOW TO BECOME A GREAT COMMUNICATOR AND CREATE CONVERSATIONAL COMPETENCE, USING STORIES AND ANALOGIES

Because the Securities Industry often attracts a Type A personality, listening is often a skill that must be acquired. In this segment, Don and Richard discuss:

- a 4-step program to improve your communication skills;
- how all of the greatest speakers in the world have used parables, stories and analogies to get their message across.

You will learn:

- the art of storytelling and story selling;
 - how to become a professional listener;
 - how to create conversational competence to make clients feel comfortable with you.
-

4. HOW TO CREATE A RIGOROUS CLIENT ACQUISITION AND RETENTION PLAN AND LET GO CLIENTS WHO DO NOT FIT YOUR BUSINESS MODEL

Acquiring the right clients and keeping them over the long run is the basis for a great business. In this segment:

- Richard illuminates the six ways to add substantial accounts;
 - Don uncovers the many ways you can ensure long lasting relationships;
 - Then a joint discussion centers on how to keep assets when money is passed to a spouse or children.
-

For further information and to reserve a date for your annual meetings,
email info@donconnelly.com or call: 941.346.1166

Don Connelly & Richard Capalbo – How to Excel in the Securities Business

You will learn how to:

- improve your prospecting skills;
 - build better and long-term relationships with your clients and their families;
 - let go of clients who don't fit your business model.
-

5. HOW TO MASTER A SOPHISTICATED BUT EASILY COMMUNICATED ASSET MANAGEMENT PHILOSOPHY

There is the classic argument in the financial service industry as to whether it is more important to manage the client's assets or to manage the clients. Don and Richard both concur that it is the latter but in this segment, they:

- put forth a sophisticated and easily understood Asset Management Philosophy, which makes use of competent money managers with proven track records to manage the assets while letting the financial advisors concentrate on managing the clients;
- take a new look at the asset allocation process and the use of alternative investments.

You will learn:

- when to make the critical decision that all elite Advisors make about managing the business or running the business;
 - why it's more important to manage client expectations than personally managing clients' money
-

6. HOW TO REFINE YOUR RELATIONSHIP SKILLS TO GAIN TRUST, BE LIKABLE AND CONSTANTLY EXCEED CLIENT EXPECTATIONS

Trust is something that is earned over time and understanding client expectations is the key to building trust. In this segment:

- Richard demonstrates a trust model with the four different types of trust relationships;
 - Don discusses the ways to manage client expectations.
-

For further information and to reserve a date for your annual meetings,
email info@donconnelly.com or call: 941.346.1166

Don Connelly & Richard Capalbo – How to Excel in the Securities Business

You will learn:

- how to build trust;
 - how to move up the ladder of trust with clients over time;
 - how to exceed expectations on a continuing basis.
-

7. HOW TO DIFFERENTIATE YOURSELF FROM THE GROWING COMPETITION

With the same information on everybody's fingertips it is more difficult than ever to differentiate yourself from the crowd. In this segment, Don and Richard discuss:

- why today more than any other time in history, it is important to be the best at what you do;
- the methods that one should use to create value that is unique to your clients.

You will learn:

- how to create your value proposition;
 - why you have to constantly sharpen your skills;
 - why to surround yourself with experts on every aspect of a client's life.
-

**CDS AND DIGITAL RECORDINGS NOW AVAILABLE FOR PURCHASE -
VISIT DONCONNELLY.COM/STORE**

For further information and to reserve a date for your annual meetings,
email info@donconnelly.com or call: 941.346.1166