Break Through Advisers

Public Speaking Topics

The depth of topics in which our organization is qualified to speak on are substantial. Because of the broad range of topics, we've consolidated them into five primary area's; Wholesaler Training, Operations and Staffing, Business Management, Firm Growth and Client Satisfaction, and Investment and Insurance Solutions.

Wholesaler Training

Maximizing Your Value (Wholesalers) Duration: 1.5 hours
- Discuss tools that engage advisers
- Understanding the prospects business
- Creating value and not being paid for it

Operations and Staffing

Practice Management - Done Right! Duration: 1.5 hours
- What is practice management
- Addressing the ideal vs. real you
- Creating a vision, urgency and short-term wins

Resource Allocation Duration: 1 hour
- Why hire resources
- Adviser control issues
- What roles are filled
- Being process dependent, not person dependent

Create Operational Leverage Duration: 1 hour
- Organizational hierarchy
- Model work week
- Detailed responsibilities per role
- Client meeting preparation and follow through

Effective Work Teams Duration: 1 hour
- Importance of effective work teams
- Understanding employee motivation
- Employee personality and behavior
- Staff empowerment

Human Resources Duration: 1.5 hours
- Identifying and hiring staff
- Interview process
- Addressing bad behavior
- Reprimands and terminations

Public Speaking Topics Continued

Business Management

Break Away: Owning A Business — Duration: 2 hours

- Steps to owning a business
- Building a business plan
- Common pitfalls
- Success with marketing

Achieving Rejuvenation — Duration: 1.5 hours

- Being a slave to the business
- Impact of the decision we don't make
- Power of forgiveness
- Personal growth through positive actions

Business Benchmarking — Duration: 1 hour

- Client efficient rate
- COGS - what are yours
- Various business metrics

Managing Your Business — Duration: 1 hour

- Owners role in the business
- Building a business plan
- Considering productivity and financial ratio's
- Compensating staff

Business Valuation — Duration: 30 mins - 1 hour

- Why you should value your business
- Valuation basics
- Steps to maximize the value

Compliance — Duration: 1 hour

- Avoiding compliance pitfalls
- Document, document, document
- Discuss case scenarios
- Fair pricing standards

Firm Growth and Client Satisfaction

Client Themed Experience — Duration: 1 hour

- When the experience begins
- Office design
- Specialized client events

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Public Speaking Topics Continued

Permission Marketing — Duration: 1 hour

- Client events
- Client survey's
- Brand recognition

Capturing Intrinsic Value — Duration: 2 hours

- Analyzing your current book of business
- Improving current fees from existing clients
- Tools to improving client wallet share

Acquiring Other Advisers — Duration: 2 hours

- Reasons to acquire
- Identification process
- Evaluating the business
- Terms and price

Building an Advice Relationship — Duration: 1.5 hours

- Why provide planning services
- Pricing - not a loss leader
- Tools for delivery

New Client Acquisition — Duration: 1.5 to 2 hours

- Client events and survey's
- Brand recognition
- Prospect Seminars
- Centers of influence

Going Fee Based — Duration: 1 hour

- Why go fee based
- Identifying potential clients
- Conversion process

Investment and Insurance Solutions

Portfolio Construction — Duration: 1.5 hours

- Tools of the trade
- Importance of modeled portfolio's
- Screening investments
- Alternative investment options

MVO vs Monte Carlo Simulations — Duration: 45 mins

- Evaluating which tools work best
- Pitfalls of MVO and Monte Carlo
- Presenting these concepts to clients

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Public Speaking Topics Continued

Effectively Using REIT's — Duration: 1 hour
- Due diligence process
- Why consider REIT's
- Publicly traded compared to Non-publicly traded
- Client expectations

Building a Client Pension — Duration: 1 hour
- Review of the Ernst and Young analysis
- Analyzing annuity benefits and features
- Implementing annuities in your business

Fixed Indexed Annuities — Duration: 1 hour
- How do FIA's work
- Past problems with FIA's
- How clients may benefit

Asset Based LTC Solutions — Duration: 1 hour
- How does asset based compare to traditional
- Why use asset based LTC
- Working with high net worth clients and LTC

Life Insurance — Duration: 2.5 hour
- Tools and strategies available
- Holistic approach to client relationships
- Premium finance - What is it
- When to consider life settlements

Life Settlements — Duration: 1 hour
- What is a life settlement
- Potential client benefits
- Getting started
- Best practices when implementing

Client Policy Reviews — Duration: 30 mins
- CPR: Key to survival
- Business potential
- Steps for implementation

Presenting LTC — Duration: 45 mins
- Understanding the market
- Creating proposals
- Presenting to clients

Contact us today for more information

TEL (586) 202-6969

www.BTAdvisers.com