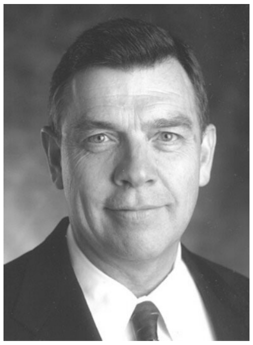
Trusted Resources List

Featured Business-Building Expert



Quick! You only have a few seconds to create that crucial first impression. Are you ready? Let Business Communications Coach, Bill Swift, take you to the next level of mastery.

In group settings, Bill shares tried-and-true principles that will help you improve all aspects of their interpersonal and public speaking skills. Through stories, examples and specially-crafted exercises, he'll get your group thinking, talking and acting like the champions they are.

As a personal coach, Bill will challenge and support you in becoming a better communicator and results-oriented producer. With over fifteen year's Executive Consulting experience, Bill's transformation and leadership programs have produced large-scale change at prestigious institutions, such as Yale-New Haven Medical Center.

Through Personal Results Coaching and Communications Workshops, he has helped hundreds of professionals achieve the next level of success. Contact Bill at 913.694.5009 or via email at BillSwift@ImpactCommunications.org now.

Private Label Money Management
Custom Business Solution for Fee-Based RIAs

FocusPoint Solutions
Kelly Staley, Director of Business Development
Phone: (866) 201-3034
Email: kellystaley@FocusPointSolutions.com
Web: www.FocusPointSolutions.com

- Private Label Money Management Program
- Totally Invisible to your Clients
- The Contract is with You – Not Your Client
- You Control All Client Communications, Nothing Comes Directly from the Provider
- Regular Email Communications and Teleconferences Keep Your Fully Informed
- More Cost-Effective than Traditional Third-Party Management Program
- Turnkey Virtual Office Solution – Work from Any Internet Connection
- Real Time Information at the Push of a Button
- Outsource All Back Office Functions -or- Custom Design a Program of Support
- Actively Managed, Strategic Asset Allocation Philosophy
- CFA-Guided Research, Veteran Investment Committee
- Adopt the Firm’s Investment Philosophy or Have them Implement Your Own
- Access to Financial Planning, Case Writing, Compliance and Marketing Services at a Discount
- Personalized Advice on Building a Profitable Fee-Based Business that will Generate a Steady Stream of Revenue now and be Most Valuable Should You Wish to Sell it in the Future

Turnkey Business Models

The Garrett Planning Network
Build a Thriving Hourly-Fee Business (billable hours and planning fees)
www.GarrettPlanningNetwork.com.

FocusPoint Solutions
Build a Profitable Fee-Based Business (AUM and planning fees)
www.FocusPointSolutions.com

Training Organizations

Heartland Institute of Financial Education
The institute offers the CFE Certified Financial Educator® designation to professionals who successfully complete their credentialing process. Dr. Thomas Garman is one board member whose name you may know. You may also wish to apply to the Registry of CFEd™ professionals and become an instructor for the institute. The educational programs are sponsored by a nationwide Consortium of Colleges and Universities. Go to http://www.heartlandfinancialeducation.com.

The Kinder Institute of Life Planning
Take your Client-Advisor Relationships to a Deeper Level with the 5-Phase Life Planning Process developed by industry thought-leader, George Kinder, CFP®. Learn about the Kinder Institute's comprehensive Life Planning Curriculum and Presentation Trainings at www.KinderInstitute.com.

The Strategic Coach
Ever wonder what gives some advisors the winning edge while others flounder for direction? Chances are, the motivated advisor has completed the Strategic Coach program. Discover your Unique Ability and Leverage your Strengths in this proven entrepreneurial program developed by industry sage, Dan Sullivan. Go to www.StrategicCoach.com.

Landmark Education
Transform all Areas of Your Life and Produce Results You Never Thought Possible through Landmark Education's powerful "Curriculum for Living" courses. View their informative video at www.LandmarkEducationcom.

Business Coaches / Motivational Speakers

Tom Werder, *Small Business Champion, Author, Speaker, Motivator and Coach*
Using the Bull's Eye Principle to Produce Results in Your Business. Goal Setting and Motivational Programs from a quintessential entrepreneur and business-building champion. Learn more at www.TomWerder.com.

Bill Swift, *Executive Consultant, Speaker, Accountability Coach*
People skills can make or break you in this business. Learn how to be a better public speaker and more effective communicator and you can make a profound difference in your relationships. And what about your systems? Get targeted advice and hands-on business plan design from a master in operations. An accomplished coach, Bill also offers Results Realization Programs. Visit www.ImpactCommunications.org for more information.

Advanced Case Writing and Analytical Support

John P. Carrig, CFA, CFP®
Gold Coast Financial Planning
Phone: (954) 360-7448
Email: jc@GoldCoastFinancialPlanning.com
Web: www.GoldCoastFinancialPlanning.com

- Chartered Financial Analyst
- Retirement Planning Projections, Cash Flow Projections, Education Analysis, Survivor Needs Analysis
- Will travel to meet with you and/or your clients, if desired
- Project-based fees or as-needed hourly services
- Software used: MoneyGuide Pro, fplan, custom spreadsheets

Laurence T. Hanslits, CFP®
Hanslits Case Design
Phone: (541) 997-6100
Email: larryhanslits@thehgroup.com
Web: www.thehgroup.com

- Estate planning specialist – No case too large or too small
- Retirement Planning Projections, Cash Flow Projections, Education Analysis, Survivor Needs Analysis
- Available to meet with you and/or your Clients, if desired
- Retainer, project-based and/or revenue sharing arrangements available

Financial Plan “Ghost Writers”

Project-based or hourly arrangements

The following professionals have built capacity into their firms as a way to offer collaborative, project-based support and/or hourly services to other financial planners who prefer to outsource some or all of the steps in the financial planning process. Projects might include: Retirement Planning Projections, Cash Flow Projections, Education Analysis, Survivor Needs Analysis, etc.

Mary Brooks, MA, CFP®
Brooks Financial Planning
Phone: (719) 492-1833
Email: info@BrooksFinancialPlanning.com
Web Site: www.BrooksFinancialPlanning.com
Software used: MoneyGuide Pro, custom spreadsheets

John P. Carrig, CFA, CFP®
Gold Coast Financial Planning
Phone: (954) 360-7448
Email: jc@GoldCoastFinancialPlanning.com
Web: www.GoldCoastFinancialPlanning.com
Software used: MoneyGuide Pro, fplan, custom spreadsheets

Mary L. Gibson, CFP®
Financial Planning and Advice for the Future You Deserve
Phone: (831) 623-2126
Email: info@mlgFinancialPlanning.com
Web: www.mlgFinancialPlanning.com
Software used: MoneyGuide Pro, MoneyTree suite (Easy Money, Golden Years)

Nancy J. Lange, CPA
Hartland Tax & Financial Advisors
Phone: (810) 632-5024
Email: nancy@HartlandAdvisors.com
Web: www.HartlandAdvisors.com
Software used: CCH's Enteract, custom spreadsheets

Naomi Y. Scrivener, CFP®
Back Office Solutions, LLC
Phone: (512) 863-0883
Email: nscrivener@backofficesolutions.net
Web: www.backofficesolutions.net
Software used: Integrate 2000, MoneyTree Suite (Easy Money, Golden Years), NaviPlan Extended, Money Guide Pro

** Special Note: Naomi Scrivener's entire business is working with advisors to support their financial planning and case design efforts. She transitioned from being a fee-only financial advisor and created Back Office Solutions in 2000*

Independent Client Audits and Detailed Survey Analysis

AdvisorImpact!
Julia Littlefield, Principal
www.advisorimpact.com

Do-It-Yourself Client Survey Systems

Survey Monkey
www.surveymonkey.com

Comprehensive Marketing Communications Solutions

Impact Communications, Inc.
Marie Swift, Principal
www.ImpactCommunications.org

Helping a Select Group of Highly-Successful Advisors Build and Enhance their Practices Since 1988