

# NEIL WOOD CONSULTING

Helping *Financial Advisors* Gain More *Referrals* Have More *Fun* and Find More *Time*



Neil Wood is the President at Neil Wood Consulting. He travels throughout the United States and North America as a keynote speaker sharing his expertise on how to strengthen client relationships, get introduced to high quality referrals, gain more assets and how to host successful client events. He has also given thousands of presentations on how to market yourself and your business more successfully, since he became a full-time speaker in 2000.

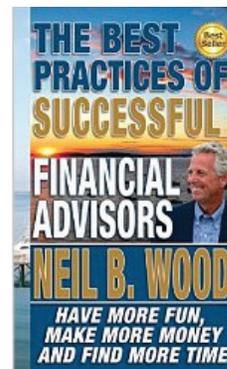
Professionally, Neil has spoken in front of more than 28,000 people over the last 14 years. His presentations are based on his extensive research, his own life experiences and experiences of the thousands of successful people he has met and interviewed in the last forty years. He has been involved in the financial services industry since 1987 and has learned by working with the Best of the Best in sales. Neil's new book, *The Best Practices of Successful Financial Advisors* was published in 2014 and became an Amazon Best Seller in October. His goal is to teach salespeople how to find more time, make more money and have more fun!

## BULLET-PROOF YOUR BOOK OF BUSINESS AGAINST ROBO ADVISORS AND COMPETITION

Robo advisory programs currently have \$16 billion in assets but that's expected to skyrocket to \$255 billion by 2019. Should advisors ignore the Robo Advisor programs like they did with the no-help/no-load companies or shall they take a stance, be proactive and find more ways to retain the clients and assets they've worked so diligently for? Many top-producers have created a way to partner with the robo advisor programs to provide another level of service to their lower tier of clients. The advisor has many options but they should have a clear understanding of the robo advisory programs. This could be another tool to help their clients and themselves. Who is the Robo target market? What are the fees? What are their strengths and drawbacks? How many companies are involved in robo advising? What should advisors learn so they can speak intelligently to their clients about it?

### SAMPLE CONTENT:

- > Who does Robo advising appeal to and why?
- > What are the strengths and weaknesses of these programs?
- > What major firms are embracing these programs for their advisors?
- > What do you have to gain or lose?
- > What is the underserved "forgotten middle?"
- > Battle it or embrace it. It's your choice.



### TESTIMONIALS

*"I have enjoyed a 20-year professional and personal relationship with Neil Wood. He has always brought an innovative and optimistic view to the Financial Services Industry and has the unique ability to build relationships with the very best advisors in our business and help them strategically grow and reach new levels of success."*  
- M. Darnell, Managing Director

*"Neil has created an easy to follow GPS with a road map to success for financial advisors. His book and presentation should be a required read for all newly registered FA's and serves as an excellent tune up for those of us who have been around for a while."*  
- Steve P, Merrill Lynch, San Diego, CA

*"Neil has done a great job of consolidating some of the greatest ideas in practice management. If you can implement these ideas, over time you WILL have success."*  
- Ernest W, Raymond James & Associates

*"Neil's real life experience in helping people develop a successful business and personal life is very apparent in this presentation. Neil has filled all three of those roles with many top notch advisors. He is successful because he lives the way he advises...to the fullest."*  
- William P, Million-dollar Producer, LPL