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!

ARE YOU PREPARED FOR THE EPIC TRANSFER OF $41 TRILLION?

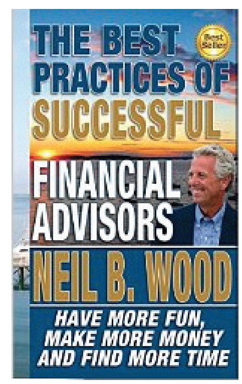
An estimated $41 trillion will pass from one party to another over the course of the next 30 years. The good news for financial services professionals is that many recipients will seek advice on how to grow and share their wealth with their loved ones. Unfortunately, over time many of these wealth transfers are not successful due to disharmony among family members, depletion of resources (due to treatment of addiction, divorce costs, foolish investments and derailed lives for example.)

Advisors can help with this transition IF they've established trust with most the family members as opposed to only their clients. If not, it is quite common (more than 92%) that family members fire their parents' advisor upon an inheritance after a death of their parents. There are many actions that advisors can take now to help their clients' families with a more successful transfer of that wealth.

This presentation covers numerous conversation topics and actions the trusted advisor can share to help preserve that wealth and help generations to come.

SAMPLE CONTENT:

- **Here's the good news for your clients' children**
- **New wealth arrives with many challenges for recipients and you the advisor**
- **What you can do now to help this wealth-transfer go more smoothly**
- **Expert resources to help you beyond your comfort zone**
- **Know the BIG difference in the minds of Boomers vs Millennials and Gen X**
- **Don't be one of the 92% of advisors that get fired by the "kids" of their clients**



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

"Great advice for financial advisors to help them look at strategies to improve revenue and minimize non-revenue generating activities." - R Thompson, LPL

"Neil Wood is one of the greatest speakers, motivators and teachers I have come across. He understands the struggles financial advisors face each day and helps to articulate the best practices and steps necessary to become an elite advisor." - R Shansky, Independent Advisor

"Great presentation and presenter! Thanks to Neil, I have more time for my family – while my business is the best it's ever been!" - Timothy K, Ameriprise