

Thursday Insights for January 2012
2:30 p.m. – 4:00 p.m.

January 5, 2012 – Under Utilized Tools for Today’s Business Succession Planning Needs; Presented by Gregory Banner, CLU®, CFP®, CRTP and Alejandro Matuk, Esq.

Gain an understanding of how to create a defensible and practical business valuation with special attention to cash flow issues. Various advisors may inadvertently emphasize their specific areas of specialty which can result in an incomplete plan. Discover a process to help you identify and ensure the maximization of your client’s goals and dreams. Greg and Alex will discuss how to make the most of these concepts while partnering with the business owner and other collaborative professionals to drive a successful transition.

January 12, 2012 – Today’s Mass Affluent Client (\$1 - \$10 Million net worth) Investment Options – Is Protection the Name of the Game?; Presented by Jeffrey Nash, Managing Director and Peter Sasaki

Retail investors and their advisors face a number of challenges in the current environment. Traditional models that provide market exposure through long-only stock and bond mutual funds may not be the best for your client. Is modern portfolio theory providing the risk diversification it did 20 years ago - or is it time to evolve? Join Jeff and Pete to find diversification by incorporating alternative assets and strategies, eliminating excess fees when possible, and seeking only those active managers that aim to limit loss. Institutional asset strategies are at long-last finding their way to the retail investor.

January 19, 2012 – Growing Your Practice – Partnering with SCI; Presented by Joseph J. Strazzeri, Esq. and Shelley Lightfoot, Executive Director

Joe and Shelley will share a process to help grow your practice through clarity in message, benefit and process marketing, and partnering. Learn the steps involved to compare and contrast the differences, concerns, and opportunities of the reality of your firm compared to what you believe it is and what you want it to be. Refine your practice - attract new clients, engage current clients, re-approach prospects, and increase cross referrals.

January 26, 2012 – Pre-empted Due to Bi-annual Marketplace Planning Day



Happy
New Year!