

COUNSELOR DAY OVERVIEW

We Help Advisors:
Understand & Communicate
Revenue Opportunities That
Help Clients In Today's Market

TIME	ADVISOR FOCUS SESSION TYPE*	ADVISOR(S) NAME	CLIENT NAME	SUBJECT & INSIGHTS
7:00 - 7:50am				
8:00 - 8:50am				
9:00 - 9:50am				
10:00 - 10:50am				
11:00 - 11:50am				
12:00 - 12:50pm	Stump The Counselor - Lunch			
1:00 - 1:50pm				
2:00 - 2:50pm				
3:00 - 3:50pm				
4:00 - 5:30pm	Stump The Counselor - Wine and Cheese			

***ADVISOR FOCUS SESSIONS TYPES:**

- My Client
- My Book of Business
- Our Study Group

YOUR INDEPENDENT COLLABORATIVE ADVISOR FIRM PROVIDES:

- A single conference room for the day;
- The manager's assistant that creates and keeps the schedule;
- A work station for the Counselor's assistant that day; and
- The group conference room for "Stump the Counselor" times.