

# TESTIMONIALS



It is so great to have a process that allows me to get paid for the creative work that goes into designing a plan for taxable estates — intellectual property that I used to give away for free.

The clients are thrilled because they have a clear understanding of what they are getting for their investment, and they take the process more seriously. Thanks so much for helping me to create the tools and language that take me to the next level in my practice!

**LORI ADASIEWICZ**  
*Menlo Park, California*



The Laureate Program has been invaluable to my growth as an attorney in the high net worth arena. The program is unique in that it integrates advanced legal-technical

education with a process for attracting and working collaboratively with high net worth advisors and their clients. Having a process to foster collaboration is critical to providing consistent, high-level service.

In the Laureate case studies, the members are divided into interdisciplinary groups that work collaboratively to design and present an advanced plan to the other Laureate Members. Having the ability to present these plans to our peers in a “safe environment” has honed my presentation skills and raised my confidence.

**MARC SELDEN**  
*New York, New York*



Our CPA Firm enjoys working with affluent families and especially those with strong real estate interests. The Laureate Programs have added a new dimension to our collaborative, design, and

implementation skills. Practicing these skills and advance techniques in live case studies with other Laureates has enhanced the way we do business.

**LAURA STEES**  
*San Diego, California*



The Laureate Program has been without a doubt the program that has raised my “quiet confidence” level in working with high-net worth individuals and families. When the clients and their advisors see that confidence, they are more likely to act positively on our recommendations. Paying attention to the “3 Pillars” in my practice has raised the profitability of the practice, as well as the enjoyment of helping families meet their goals.

**RICHARD ABBONDANZA**  
*Portland, Maine*



Servicing the high-net worth family is an acquired skill far surpassing technical knowledge. Each team member needs to understand and master their role in the process. Financial planners, insurance agents, accountants, and attorneys can learn how to come together and achieve unparalleled success in the high-net worth arena at the Laureate program.

**VITO LANUTI**  
*Huntington Beach, California*



The Laureate in Wealth Strategies process is so well-thought through and laid out. It is not just a laboratory experiment but instead a program filled with a series of sessions designed for members to share the things that have worked and that haven’t out of their actual practices. Overall, this program is a chance to see many legal, technical, and financial strategies integrated in a practical way. The program ties everything (that’s practical and relevant) together.

**LEWIS DYMOND**  
*Frisco, Colorado*



I waited to join Joe and David in The Laureate and after just the one session we took positive steps towards implementing the Laureate Process in my practice. Having a process to not only attract but also engage affluent, caring families, along with collaborative help in designing their plans, provides us with the comfort level and knowledge necessary

to take our firm to the next level of client service and success. The first year was a knock-out, and I look forward to seeing current and potential future friends next year.

**EDEN ROSE BROWN**  
*Salem, Oregon*