

Laureate

“Achieve quiet confidence to work with successful families and business owners while practicing profitably, efficiently, and with passion.”

David K. Cahoon



Laureate Center
FOR WEALTH ADVISORS

**IT'S YOUR BUSINESS,
YOUR FUTURE, YOUR CHOICE**



 TECHNICAL KNOWLEDGE

 MARKETING

 PRACTICE MANAGEMENT

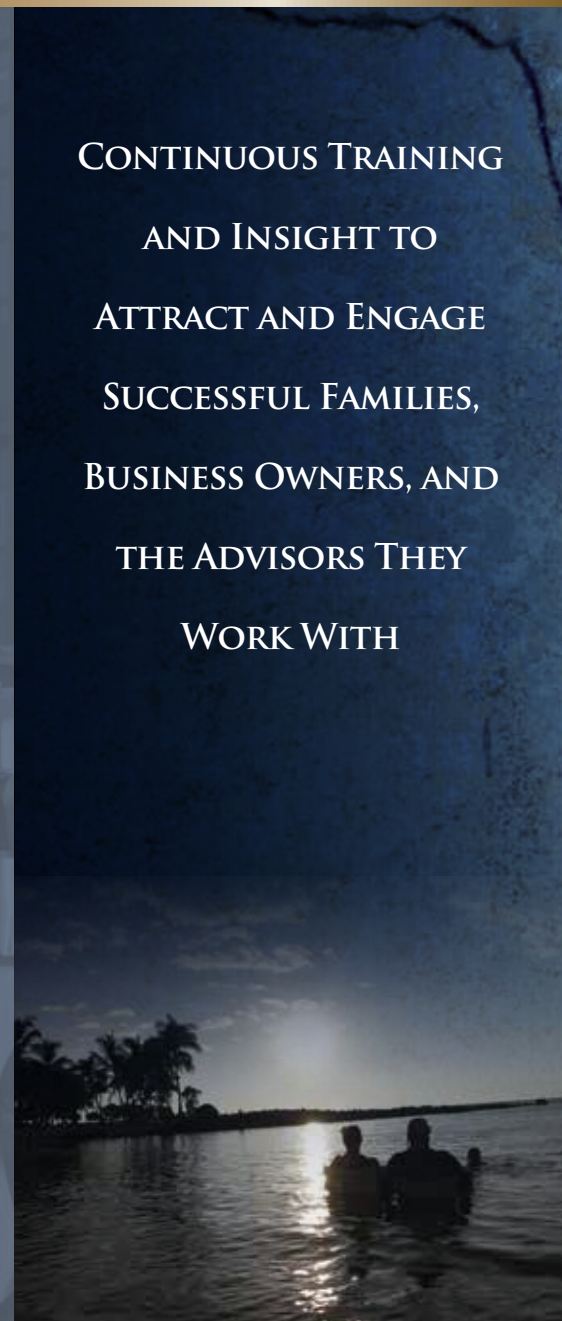
 COUNSELING & COMMUNICATION

 MARKETING SUPPORT

 TEAM TRAINING

CONTINUOUS TRAINING
AND INSIGHT TO
ATTRACT AND ENGAGE
SUCCESSFUL FAMILIES,
BUSINESS OWNERS, AND
THE ADVISORS THEY
WORK WITH

WWW.LAUREATECENTER.COM





Our four programs:



THE GATHERING *Networking, Learning, and Advice*

The Gathering is an annual event in February for all advisors in Estate, Business, and Wealth Strategies Planning. The format of the two-day event is designed to engage all participants in a conversation on current topics where audience interaction is as critical as what is communicated. Learn from presenters from various disciplines who are experts in their field and enjoy sharing and giving of themselves and their time.

\$420 participation fee



LAUREATE IN WEALTH STRATEGIES (LWS) *Improve Your Quiet Confidence*

The LWS is a 5-day certification program for AWS graduates seeking to attract, engage, and work with high-net worth families, business owners, and the other professional advisors they work with. In this collaborative model, Laureates learn: integrated wealth strategies case studies in review, design, implementation, and maintenance; benefit and process marketing; advanced case management – process and protocols; and wealth strategies client partnering.

\$4500 participation fee

Contact us today to schedule your practice enhancement and determine if the Laureate Programs are right for you.



ADVISOR IN WEALTH STRATEGIES (AWS) *Increase Your Technical Knowledge*

The AWS is a 5-day certification program intended for successful professionals that are wondering “what’s next?” In a high-paced, interactive model, wealth advisors from all disciplines collaboratively learn: wealth and business strategies technical knowledge; product and strategy marketing; practice management processes; and the difference and intricacies between wealth strategies advice and engagement. AWS serves as a pre-requisite for the LWS program. **\$4500 participation fee**



LAUREATE ADVISORS BUREAU *Continue to Grow Your Practice*

Members of the Laureate Advisors Bureau are LWS Graduates who stay involved and are trained to facilitate teams of advisors in our Laureate Programs and their own communities. Members also receive continued collaboration which provides you and your team a place to go for: **(\$1200 annual participation fee)**

- o Up to date knowledge on cutting edge strategies for legal, tax, and financial planning and current issues;
- o Team training and support for maximum implementation;
- o Leadership, collaboration, and direction in an ever-changing world; and
- o Annual attendance at the Gathering for you and a guest as well as ½ price tuition for AWS and LWS 5-day refresher courses.

Nathalie Fairfax, Programs Director
connect@laureatecenter.com
858-200-1919

3636 Nobel Drive, Suite 450 | San Diego, CA 92122
www.laureatecenter.com