

ROUNDTABLE

THE MASTERMIND GROUP OF ELITE FINANCIAL ADVISORS

October 26-28, 2016
Hyatt Regency San Francisco Airport



"I always leave sessions feeling that **we have an edge** on not only other advisors but our clients as well."

—Byron Sanders, Roundtable member for six years

"Roundtable has helped me **increase AUM 11X** in the last six years while serving our clients in world-class way."

—David Witter, Roundtable member for six years

"Roundtable has been invaluable to my practice through the connections I have made with other Roundtable members. All in all, it's an **unmatched source** of ideas for my practice."

—David Friesen, Roundtable member for three years

"Roundtable is like installing a jet engine in your business. You are **totally ready to take off for success!**"

—Stacy Francis, Roundtable member for one year

"The ideas and information will **change the way you run your business**, allowing you to utilize best practices to be more efficient, effective and allow more time to do the things you want."

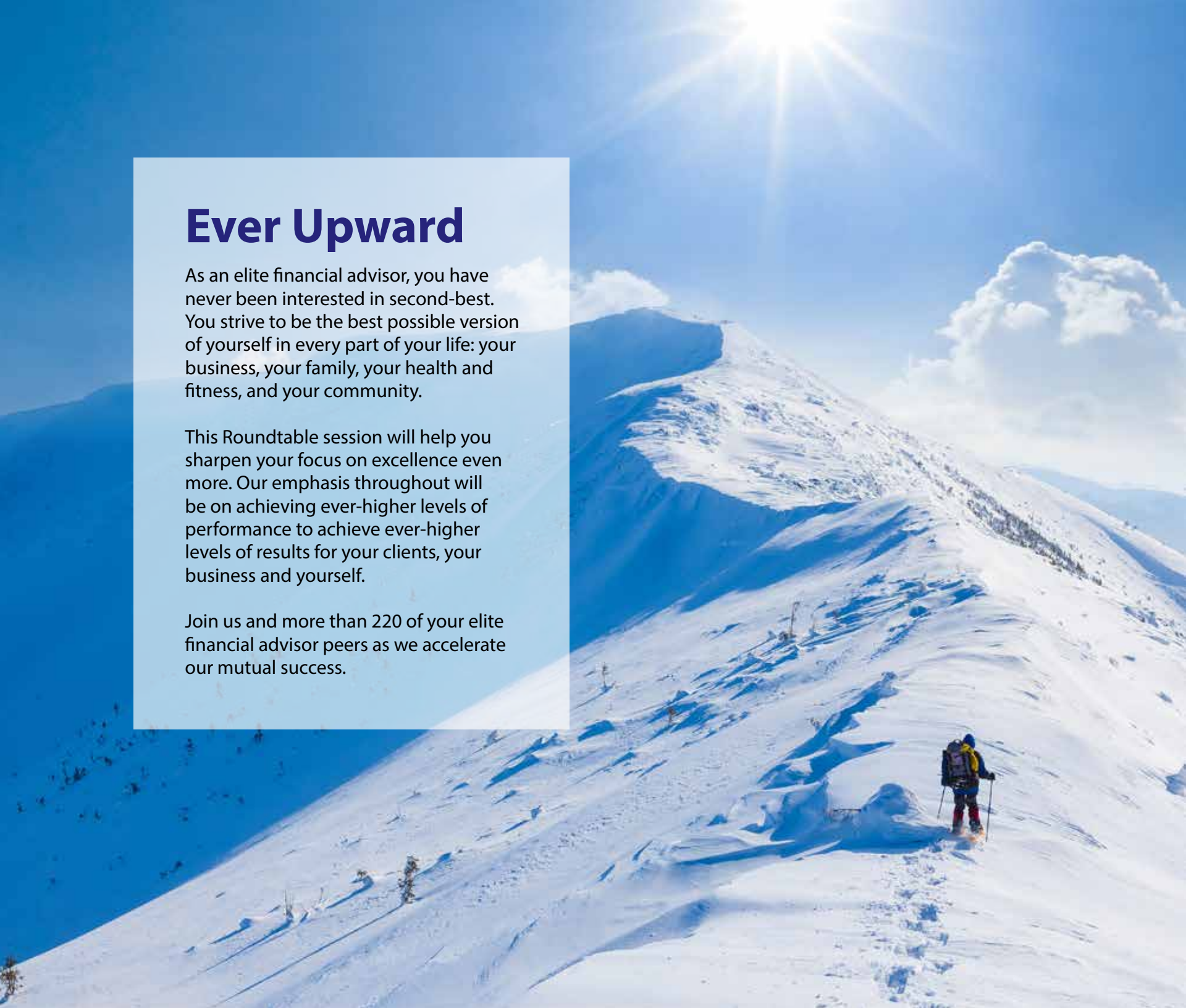
—Terry Lineberger, Roundtable member for three years

Ever Upward

As an elite financial advisor, you have never been interested in second-best. You strive to be the best possible version of yourself in every part of your life: your business, your family, your health and fitness, and your community.

This Roundtable session will help you sharpen your focus on excellence even more. Our emphasis throughout will be on achieving ever-higher levels of performance to achieve ever-higher levels of results for your clients, your business and yourself.

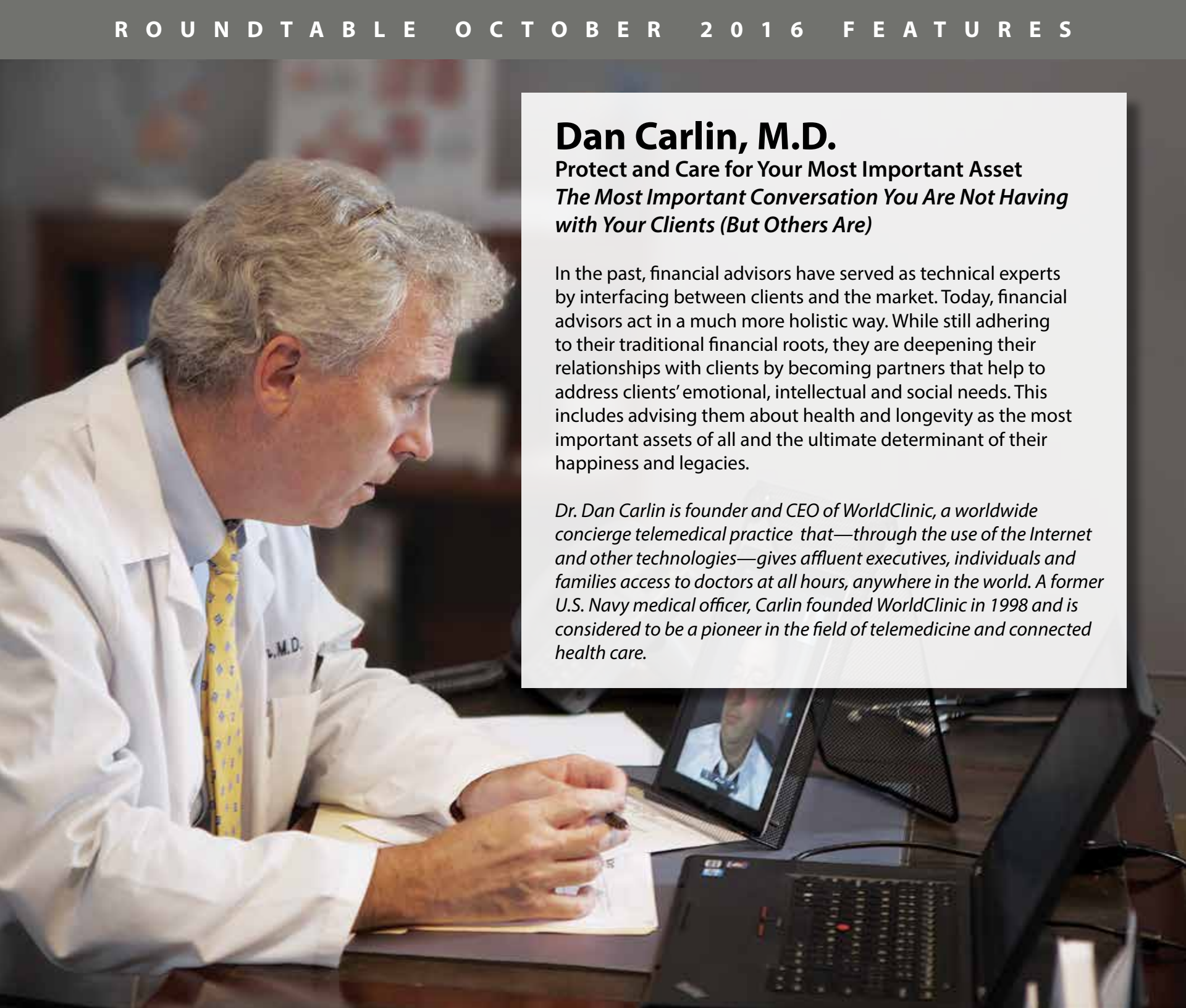
Join us and more than 220 of your elite financial advisor peers as we accelerate our mutual success.



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2016

**FEATURED
SPEAKERS**





Dan Carlin, M.D.

Protect and Care for Your Most Important Asset

The Most Important Conversation You Are Not Having with Your Clients (But Others Are)

In the past, financial advisors have served as technical experts by interfacing between clients and the market. Today, financial advisors act in a much more holistic way. While still adhering to their traditional financial roots, they are deepening their relationships with clients by becoming partners that help to address clients' emotional, intellectual and social needs. This includes advising them about health and longevity as the most important assets of all and the ultimate determinant of their happiness and legacies.

Dr. Dan Carlin is founder and CEO of WorldClinic, a worldwide concierge telemedical practice that—through the use of the Internet and other technologies—gives affluent executives, individuals and families access to doctors at all hours, anywhere in the world. A former U.S. Navy medical officer, Carlin founded WorldClinic in 1998 and is considered to be a pioneer in the field of telemedicine and connected health care.



Craig Ballantyne

The Perfect Day Formula

How to Own the Day and Control Your Life

So often we seem to just go through the motions, following our usual routine without ever stopping and thinking why we do what we do, or what we'd rather be doing instead. But sometimes, we have that one day—that Perfect Day—where everything just clicks. We feel great. We are unstoppable. And at the end of it we think, “Why can’t every day be like this?” Craig Ballantyne will show you exactly what to do to create that day.

*Craig Ballantyne is a fitness expert, coach and author of many books, including most recently *The Perfect Day Formula*. Since 2001, he has been the editor of the personal development newsletter, *Early to Rise*. His daily essays reach more than 150,000 readers and teach people how to build their wealth, improve their health and become the best version of themselves. He now coaches entrepreneurs around the globe to turn their ideas into money and to help people all over the world.*



Dave Asprey

Upgrade Your Life

Discover how to use systems thinking, science, biology and self-experimentation to take control of and upgrade your mind, body and life. Being better at everything is about reaching and maintaining a state of high performance, resilience and vibrant health where your body, mind and life work in unison to make you healthy, happy and more productive. Dave Asprey will share with you how to upgrade your performance in every aspect of your life.

Dave Asprey is an entrepreneur, businessman and author who plans to live till the age of 180 years old. He is the founder of The Bulletproof Executive and chairman of the board of the Silicon Valley Health Institute. Dave founded Bulletproof to make his breakthroughs—and the body and brain everyone deserves—easily available to all people in their daily lives.

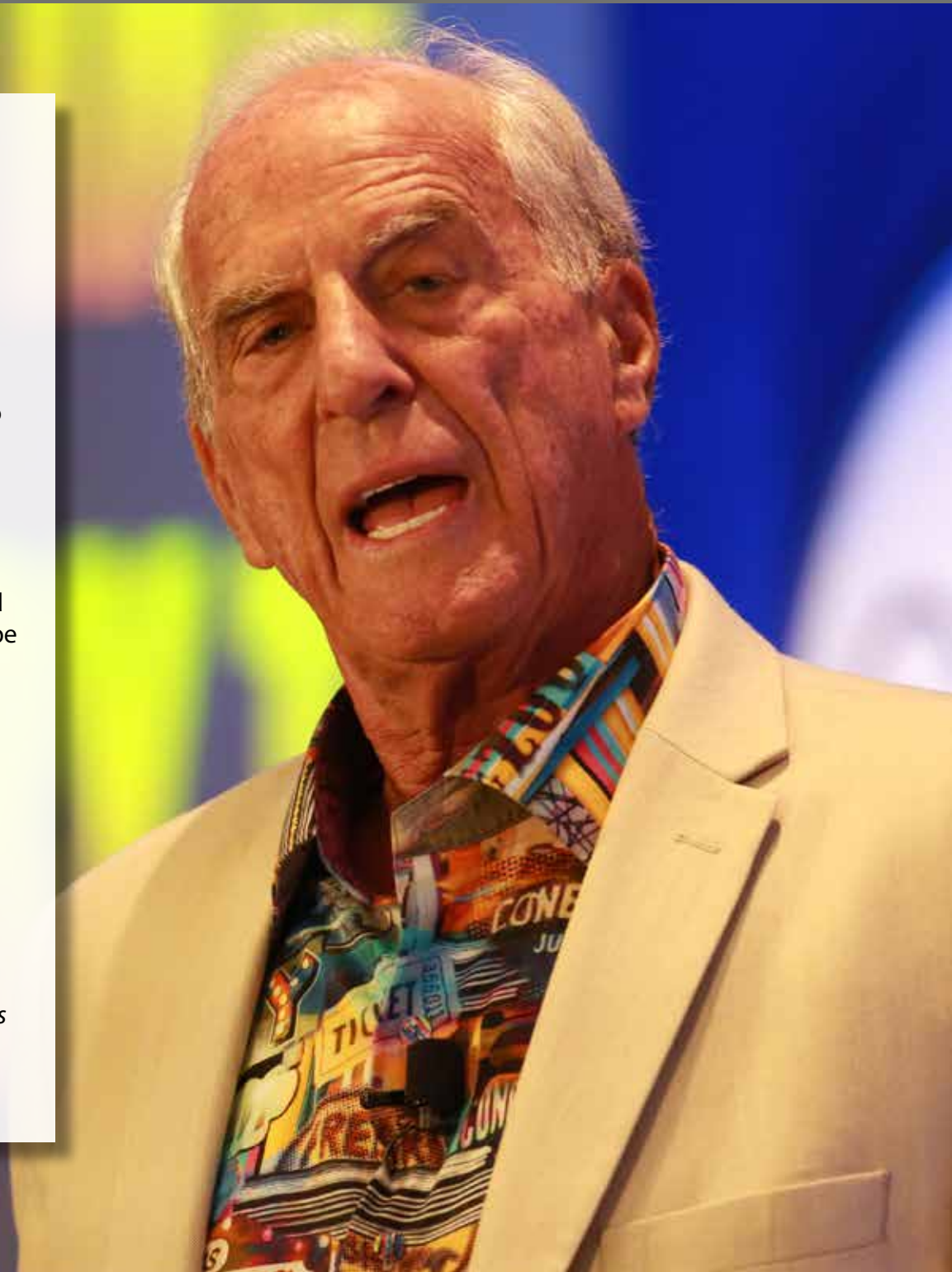
Joel Weldon

Coyote Power

How to Thrive in a Climate of Change

The last thing a successful financial advisor is thinking about right now is a coyote. Yet once you hear how the coyote has not only survived but thrived after a 99-year effort to eliminate it from the face of the earth, you'll have a three-step process on how you can thrive in the fast-changing and challenging world you compete in. It takes more than financial skills to be a successful advisor today. You need adaptability, teamwork and courage. When you have all three, you can be unstoppable—like the coyote.

For more than 40 years, Joel Weldon has been one of the most highly respected and sought-after keynote speakers and sales trainers in North America, as well as an idea consultant and executive speech coach for some of the world's leading businesses. He is the only speaker to have earned all four of the highest honors in the speaking profession: the Golden Gavel, the coveted Communication and Leadership Award, induction into the Speakers Hall of Fame and the Legend of the Speaking Profession award.



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PROGRAM



**Wednesday
October
26**



*You won't want to miss
a minute of these powerful
bonus sessions!*

PROGRAM

2:00 p.m. to 8:00 p.m.

- 2:00 p.m.– 5:00 p.m. Bonus Session: Breaking Through Tactical Acceleration *(optional)*
- Telling Your Personal Story and Articulating Your Value Promise—Jonathan Powell
 - Niche Marketing: Mastering the Role of the Go-To Advisor—Paul Brunswick
 - You're the Expert: Today's Most Effective Credibility Marketing Tools—John Bowen
- 6:00 p.m.–8:00 p.m. Welcome reception. You are welcome to bring your spouse or other guest.

Thursday October 27

If you do nothing else to accelerate your success this year, attend this Roundtable session. Just one idea implemented well will return 10 times your investment.



PROGRAM

8:00 a.m. to 9:00 p.m.

There will be a full breakfast buffet available beginning at 7:00 a.m. If this is your first Roundtable session, please join us for a special welcome breakfast beginning at 7:00 a.m.

Joel Weldon will provide feedback and recommendations following select presentations.

8:00 a.m.	<p>Opening—John Bowen</p> <p>Brilliant Execution—Jonathan Powell</p> <p>The Perfect Day Formula: How to Own the Day and Control Your Life—Craig Ballantyne</p> <p>The Roundtable Family Office Network: Your Avenue for Moving Seriously Up Market—John Bowen</p> <p>10X Talks—\$180,000+ Ideas</p> <p>Upgrade Your Life—Dave Asprey</p> <p>Facilitated Networking Exercises—Bob Niederman</p>
Noon	Networking Lunch
1:30 p.m.	<p>Becoming Seriously Wealthy—John Bowen</p> <p>Breakout Session I</p> <p>10X Talks—\$180,000+ Ideas</p> <p>Executing for Results—John Bowen and Bob Niederman</p>
5:00 p.m.	Close
5:30 p.m.	Reception
6:30 p.m.	Dinner at the hotel with a presentation by Eddie Osterland, master sommelier. You are welcome to bring your spouse or other guest.

Friday October 28

We make each Roundtable session unique and worthwhile by bringing together outstanding speakers, elegantly crafted content and leading financial advisors. You will find nothing else like it in our industry.



PROGRAM

8:00 a.m. to 3:30 p.m.

There will be a full breakfast buffet available beginning at 7:00 a.m

8:00 a.m.

Opening

Rapid Results—Bob Niederman

Protect and Care for Your Most Valuable Asset: The Most Important Conversation You Are Not Having with Your Clients (But Others Are)—Dan Carlin, M.D.

Coyote Power: How to Thrive in a Climate of Change—Joel Weldon
Breakout Session II

10X Talks—Results of Voting

Facilitated Networking Exercises—Bob Niederman

Capturing the Roundtable Opportunity—John Bowen
Session Close

12:30 p.m.

Lunch

1:30 p.m.-3:30 p.m.

Bonus Session: Focused Results Groups *(optional)*

- Building a Great Lifestyle Boutique—Jonathan Powell
- Building a Successful Enterprise—Paul Brunswick
- Scaling Up to \$1 Billion and Beyond—John Bowen and Jon Stone
(This group is by invitation only.)

Please enjoy a drink at the hotel bar beginning at 3:30, compliments of CEG Worldwide.



Breakout Sessions

Prepare to roll up your sleeves. Every breakout session is designed to equip you with distinct skills and perspectives that you can put to work in your business right away.

These are just some of the sessions we have planned:

The Power of Quiet Leadership

with Paul Brunswick

Quiet leaders are humble, use their time efficiently, are solution-oriented and, above all, are consistent in their behavior and their ability to get results. Explore the key characteristics of quiet leaders and develop a game plan for becoming an even better leader in your organization.

How to Work with the Super Rich

with Rick Flynn

Rick Flynn, founder and managing partner of the premier multi-family office serving ultra-wealthy clients, will provide the insights and strategies you need to work effectively with the Super Rich while uncovering significant new opportunities.

Perfect Life Implementation Session

with Craig Ballantyne

Discover how to do a deep dive into your daily habits and routines to identify what is holding you back from getting more done and making more money—while still getting home on time for dinner.



Jet Pilots Don't Use Rearview Mirrors: Looking Ahead to Your Next Presentation and Making It Supercharged

with Joel Weldon

Discover how you can use creative titles to capture your audience, make your statistics sizzle and add humor to energize your audience—plus many more practical and creative ideas that will power up your next presentation.

At the Crossroads of Financial Services

with Jonathan Powell

Will your future be filled with opportunities to add tremendous value to your affluent clients while you enjoy the life you want? Or will you become stuck fighting for a dwindling share of the middle market? This session will map out the way to an abundant future.

10X Talks

Long one of the most popular features at Roundtable sessions, four of your fellow advisors will share their best ideas for generating significant new revenue while attracting and serving their clients extremely well.

These are practical, proven strategies that deliver serious results. Our goal is for you to walk away with at least one strategy that will return your annual Roundtable tuition 10X. y for connection.





Bonus Sessions

Breaking Through Tactical Acceleration

Wednesday, October 26, 2:00–5:00 p.m.

These programs will accelerate your success by helping you fully execute on some of the most important **Breaking Through** strategies.

Telling Your Personal Story and Articulating Your Value Promise

with Jonathan Powell

To rise above the crowd, you must be able to communicate why you are the best-qualified financial advisor for your niche and why potential clients should choose you from all the rest. This session will hone your ability to quickly and compellingly set yourself above the rest.

Niche Marketing: Mastering the Role of the Go-To Advisor

with Paul Brunswick

Stake your claim on your niche and become the one financial advisor among all the others who is best qualified and best positioned to serve your niche community. In this session, you will discover your prime niche opportunities and how to make the most of them.

You're the Expert: Today's Most Effective Credibility Marketing Tools

with John Bowen

Being known as the expert in your niche community is the foundation for creating that steady stream of prequalified affluent prospective clients you want. This session will focus on the specific credibility marketing tools that are proving most effective right now.



Focused Results Groups

Friday, October 28, 1:30–3:30 p.m.

In this bonus session, you will join a group of advisors with whom you share common challenges and opportunities. The setting will be informal, highly interactive and tightly focused on achieving results.

Building a Great Lifestyle Boutique

with Jonathan Powell

There are Roundtable members who work with fewer than 100 households, have very small teams and work no more than 40 hours a week. If that's where you want to be, this group is for you.

Building a Successful Enterprise

with Paul Brunswick

If you have a mid-sized practice but dream to grow fast and big, this group is for you. This group is for advisors with growing practices in the \$100 million to \$700 million AUM range.

Scaling Up to \$1 Billion and Beyond

with John Bowen and Jon Stone

If you have a fast-growing practice, discover how to present your business in a way that attracts the best strategic resources—people, partners, capital and acquisitions—for even greater success. This session is for advisors with fast-growth practices that are approaching or have surpassed \$1 billion in AUM. *(Please note that this group is by invitation only.)*



Special Networking Opportunities

As a mastermind group, Roundtable is all about networking. In addition to the many informal opportunities for making contacts throughout each session, we have built specific opportunities for in-depth networking into this session:

- **Wednesday evening welcome reception** Enjoy a cocktail and appetizers while renewing your Roundtable connections and making new ones. You are welcome to bring a guest.
- **Facilitated networking exercises** Master facilitator Bob Niederman will guide you through exercises with fellow Roundtable members to build your connections and enhance your learning.
- **Thursday networking lunch** We will facilitate focused networking during lunch on Thursday to help you connect with Roundtable members who can help you accelerate your success even more.
- **Thursday evening reception and dinner event** We will host a reception followed by dinner with a presentation by master sommelier Eddie Osterland. Your spouse or other guest is welcome to attend.
- **Close of session bar** Debrief with fellow Roundtable members while enjoying a drink, compliments of CEG Worldwide.
- **And for new Roundtable members:** We want you to hit the ground running. Plan on attending our orientation breakfast on Thursday at 7:00 a.m. to find out exactly how you can get the most from your Roundtable investment.

Thursday Evening Presentation

Power Entertaining with Food and Wine

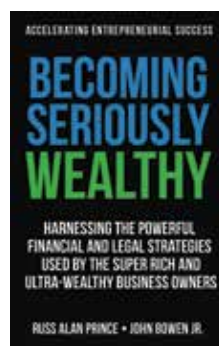
CEG invites you to meet **Eddie Osterland**, America's first master sommelier and author of *Power Entertaining*. Join Eddie as he shares his secrets for entertaining clients and friends in a fashion that most people would never imagine and will never forget. Learn how to attract high-net-worth people with food and wine—the international currency for connection.



Creating New Opportunities in Your Niche

Development is well underway on a series of books and supporting presentations that will enable you to open new doors in your target niche. Based on research into the most popular—and profitable—niches, each book can be customized with your own foreword to demonstrate your expertise in serving that niche. And each accompanying presentation is designed specifically to motivate members of the niche to explore working with you.

We will release these books and presentations over the next 18 months:



Oct 2016

Becoming Seriously Wealthy

Harnessing the Powerful Financial and Legal Strategies Used by the Super Rich and Ultra-Wealthy Business Owners



Oct 2017

Profitable Exit Planning

Becoming Seriously Wealthy Selling Your Business



May 2017

Excelling in Turbulent Times

How Private Client Lawyers Can Become Seriously Wealthy in Today's Challenging Environment



May 2018

Building a \$5 Million Practice

How Accountants Can Become Seriously Wealthy



Hotel Information

Our host hotel is the Hyatt Regency San Francisco Airport, located just minutes from San Francisco International Airport.

Hyatt Regency San Francisco Airport

133 Bayshore Highway
Burlingame, CA 94010

We have negotiated a special rate of \$269 per night for session attendees. To receive this rate, please book your room directly with the Hyatt Regency by [visiting this link](#). You may also phone the Hyatt at (888) 591-1234 or (888) 421-1442. Please mention CEG to receive the special rate.

A 24-hour complimentary airport shuttle runs every 10 to 15 minutes. To take the shuttle, go to the Departures Level center island and look for the area marked "Hotel Shuttle." The shuttle bus is marked "Hyatt Regency and Marriott."



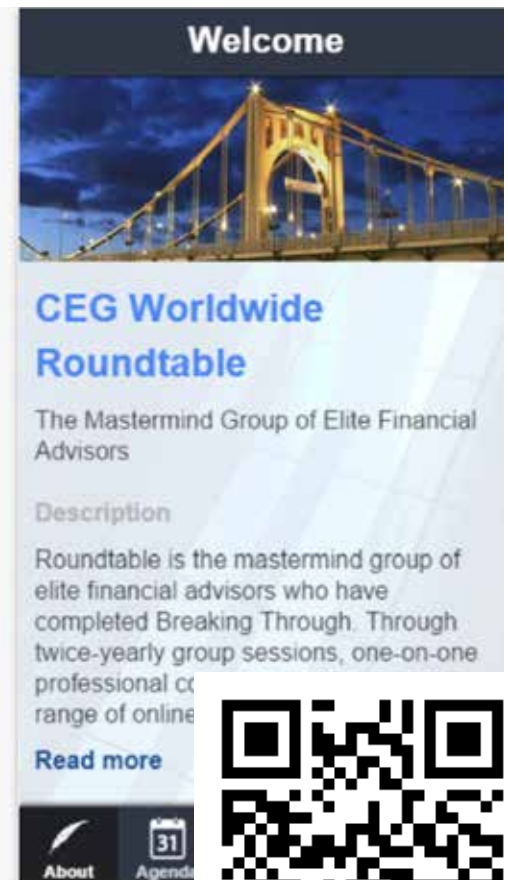
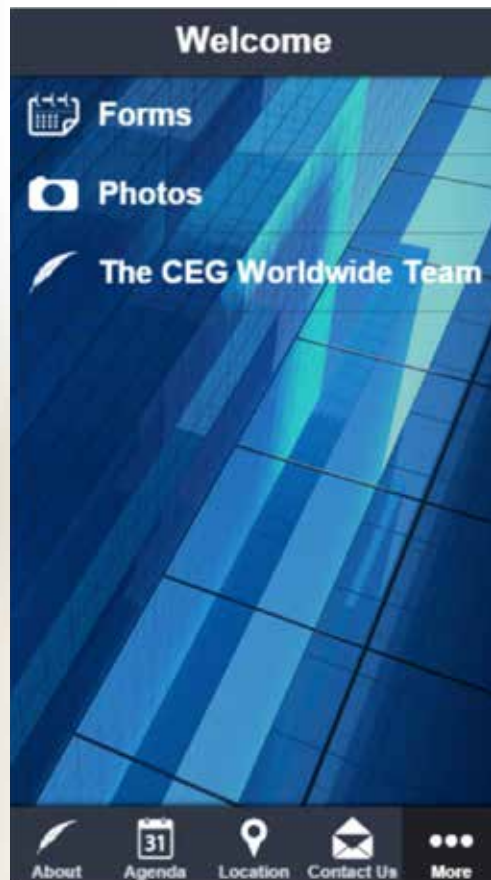
Professional Portraits

When was the last time you had a new portrait made? We will have a portrait photographer standing by to create **professional headshots**—free of charge. You can use these images for all your marketing purposes, including your web site, LinkedIn profile, brochures and other collateral.



Get the App

The Roundtable app is designed for the iPhone, the iPad and Android devices. Gain real-time session information including the agenda, location information, contact information and alerts, free from iTunes.





Why Roundtable?

Our goal is simple: Every year you're a member of Roundtable, we want you to gain a value of *at least* \$180,000 in client impact, economic value and quality of life.

Available only to graduates of **Breaking Through**, CEG Worldwide's flagship coaching program, Roundtable enables members to accelerate their success through a range of best-in-class services:

- **One-on-one coaching**

These monthly calls with a professional coach well-versed in our industry help Roundtable members remain focused on key activities to accelerate their momentum as they reach ever-higher goals.

- **Interactive mastermind sessions with other top advisors**

Twice a year, we meet for two and a half days of networking and insight, all geared to help you continue your upward trajectory—sessions just like the one described here. We record all presentations and make them permanently available in a video archive so that you can share them with your team members.

- **Access to Roundtable Online and Breaking Through Online**

These comprehensive web sites contain hundreds of pages of content, hundreds of videos and dozens of downloadable tools—all designed to help you move to and remain at the top of the industry.

- **Quarterly webinars**

Our webinars provide an interactive platform for Roundtable members to share successes, brainstorm challenges, delve deeper into key business-building strategies and receive updates on CEG's latest best practices research.

But these services are just the beginning. We constantly strive to bring Roundtable members additional tools and resources to raise their games. Read on for an overview of everything else Roundtable members receive.



*Roundtable Family Office
Network Symposia
bring together top
Roundtable advisors
with advanced planning
experts to uncover
opportunities to serve
their ultra-affluent clients.*

Roundtable Family Office Network

We have joined forces with Russ Alan Prince, a leading authority on the ultra-affluent and international expert on family offices, to assist Roundtable members in providing family office services to your ultra-high-net-worth clients.

As investment management becomes ever more commoditized, you must find new ways to serve and add value to your ultra-affluent clients. The Roundtable Family Office Network enables you to provide the entire suite of family office services to these clients without the expense of building and running your own family office.

Lifestyle services

Health and human longevity programs, concierge health care, luxury concierge care and expertise in family security—the Roundtable Family Office Network offers these services and more to ultra-affluent clients. It will become your source for the premium services these clients need to support their preferred lifestyle.

Advanced planning services

The financial challenges of your ultra-affluent clients range far beyond investment management. The Roundtable Family Office Network includes the top experts in every area of advanced planning and coordinates their work through the Global Advanced Planning Desk. With the Roundtable Family Office Network, you will be able to help your clients effectively address even the most complex financial issues.

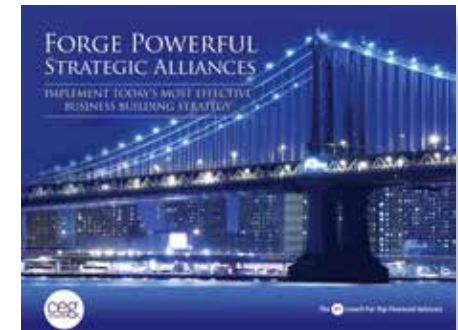


ROUNDTABLE
Family Office Network

Online Bonus Programs

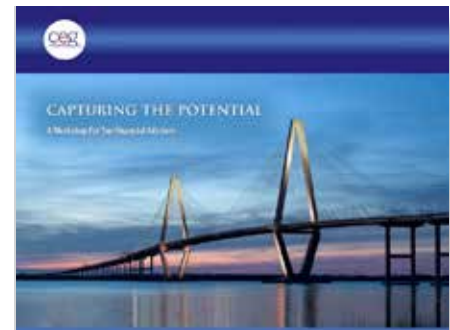
Our comprehensive online training on specific strategies is available to both Roundtable members and their teams free of charge. These are our most popular programs:

- **Forge Powerful Strategic Alliances** has one goal: to help you quickly establish at least one new strategic alliance that will generate at least one new highly qualified affluent client every quarter. With videos, tools and on-demand webinars, this program provides you with everything you need to build effective strategic partnerships.
- **Attract the Affluent** sets out seven simple strategies for attracting your ideal clients and then helps you execute each strategy throughout the program. This robust program includes extensive videos, on-demand webinars and numerous downloadable tools.
- **Creating Value Through Mergers and Acquisitions** will help you put your most important goals on the fast track—whether you are a buyer or a seller. It's for financial advisors who are ready to realize the value they have built in their businesses or who want to dramatically accelerate the growth of their businesses by acquiring other firms.





- **The Power of Presence** brings together John Bowen and master storyteller Bo Eason to deliver the information you need to build a powerful presence that will attract a high level of success to your practice.
- **Capturing the Potential** introduces the key concepts taught in **Breaking Through** and is frequently used by Roundtable members to teach their team members about these concepts. It contains videos, research, step-by-step directions and downloadable tools, all organized into a six-week program. **Now all new and updated for 2016.**



Video Opportunities

As a Roundtable member, you will have the opportunity at the May 2017 session to participate in one of two HD-quality video productions:

- **Success in Wealth**

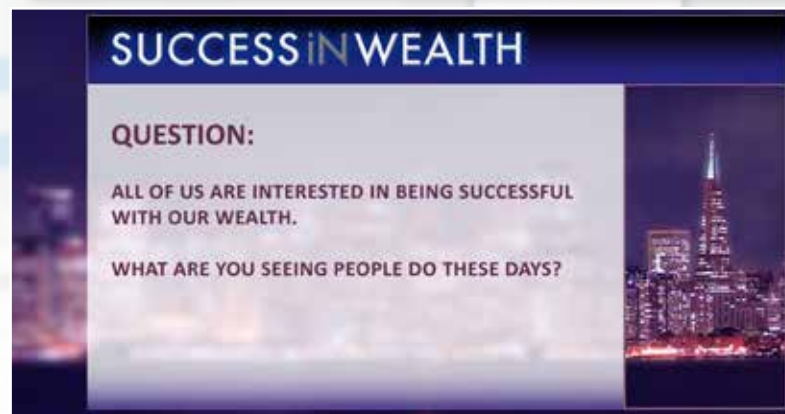
You will be the star of a TV-show format called *Success in Wealth*. This is an interview-style show with a professional actor who will ask you a series of questions, each designed to help you demonstrate your expertise in serving clients in your market niche.

- **Oblivion room**

The oblivion room studio is available for you to record any kind of video message. Roundtable members have used it to offer their second-opinion service, tell their personal stories, set out the wealth management formula and much more.

Both studios are fully equipped with state-of-the-art recording equipment and staffed by video production professionals. You will be prepped by hair and makeup artists. We will also provide you with a preproduction guide prior to the session so that you are fully prepared.

If you were to arrange a similar video shoot on your own, it would cost approximately \$3,000. As a Roundtable member, there is no fee for you to take advantage of these recording opportunities.



Resource Partners to Enhance Your Success

We have carefully selected partners from around the industry who are deeply knowledgeable about what you need to run an elite practice. These partners offer expertise and tools tailored specifically to support your wealth management process, your advanced planning services and your affluent client attraction efforts. You will simply not find this range of assistance anywhere else.



www.thebluefish.com



www.bulletproofexec.com



www.boeason.com



ROUNDTABLE
Family Office Network
www.roundtablefamilyoffice.com



www.financialadvisorselect.com



www.ruhlingroup.com



www.successcomesincans.com



Book In A Box
www.bookinabox.com

"This is a must-do if you want to be surrounded by advisors and other industry experts who will help you **think bigger than you ever imagined.**"

—John Calvert, Roundtable member for one year

"Roundtable is an opportunity to spend time with the elite of our industry. It's a **true mastermind** group of givers."

—Charles Fisher, Roundtable member for four years

"It is worth the tuition **many times over.**"

—Robert Pyle, Roundtable member for eight years





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