ROUNDTABLE

The Mastermind Group of Elite Wealth Managers

May 3-5, 2017

Hyatt Regency San Francisco Airport

ceg worldwide LLC

"Roundtable helped us grow from $9 million in AUM in 2009 to **over $100 million today**."

—David Witter, Roundtable member for four years

"**Roundtable is THE forum** for the opportunity to imagine becoming more than you thought possible. You are surrounded by and supported by some of the best advisors in the world."

—John Calvert, Roundtable member for two years

"There is **no other coaching program like it** out there: the top talent in the industry and high-level speakers and ideas presented at conferences along with extremely valuable one-on-one coaching."

—Lori Sackler, Roundtable member for three years

"Roundtable is the **best way to grow your business.** No other coaching program measures up to CEG."

—Lynne Kytle-Henderson, Roundtable member for two years

"Roundtable will bring you a level in your business that you could never have imagined. **I'm acquiring clients who were well out of my comfort zone** and having a great time in the process."

—Mark Fujiwara, Roundtable member for two years

Navigating the Perfect Storm

As we move into 2017, the transition to a new presidential administration along with imminent changes in tax law, health care and the regulatory environment are creating deep uncertainties for your clients. It is a perfect storm of ambiguity.

This Roundtable session will provide the perspectives and tools you need to lead your clients and your team through the current uncertainty to seize the opportunities the new environment will present.

Join us and more than 200 of your elite wealth manager peers as we navigate the perfect storm to accelerate our success.

MAY 2017

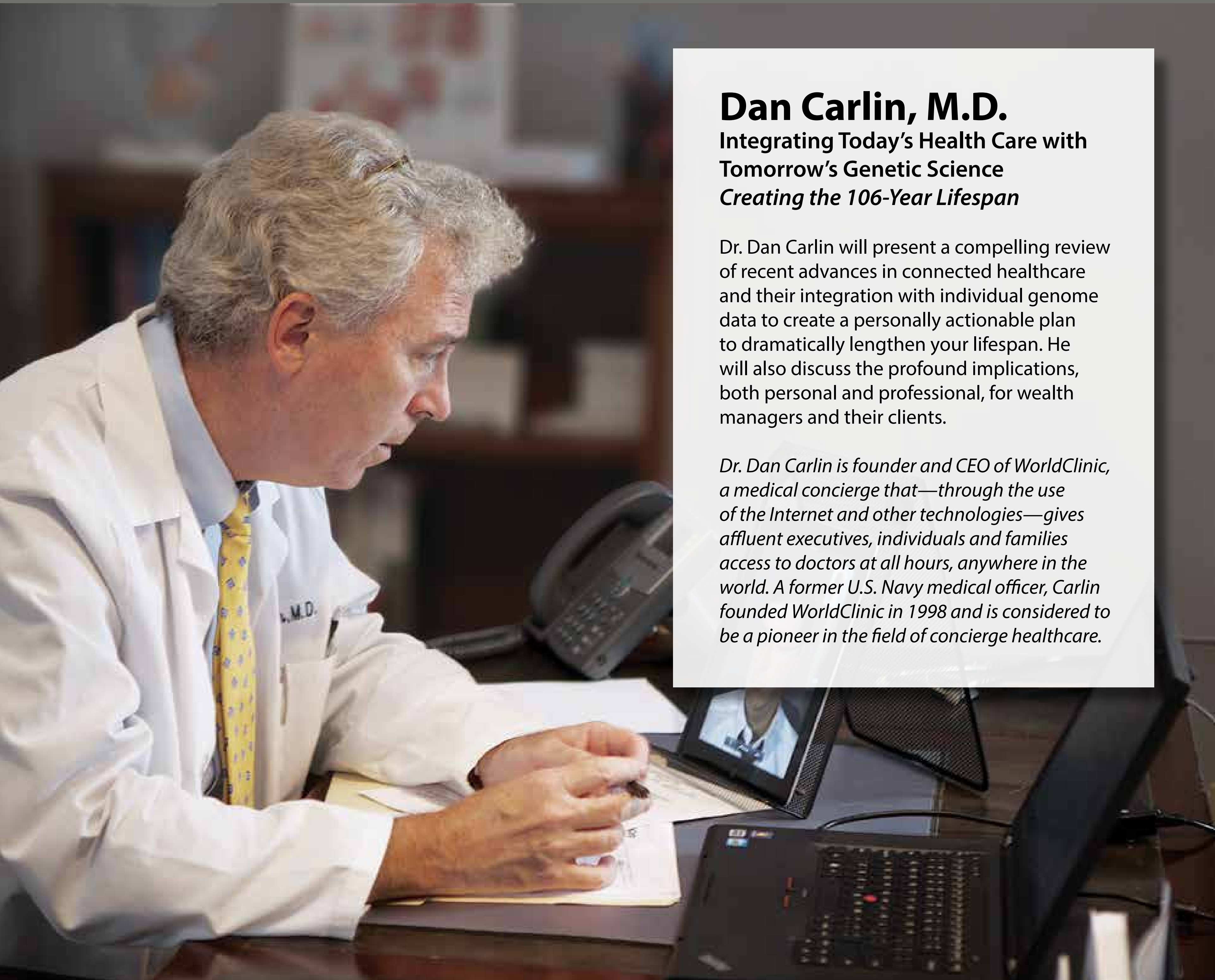
FEATURED SPEAKERS

Steve Sisler

Leadership and Self-Understanding

Every Roundtable member will have the opportunity to participate in a free, in-depth assessment of your personality and values to gain new perspective on yourself and how you lead your team and clients. In his keynote address, Steve Sisler will help you understand your behavioral and emotional wiring and how to capitalize on your behavior patterns to maximize your effectiveness as a leader.

Steve Sisler is a behavioral analyst, speaker and author. Working with clients in more than 18 countries, he gathers behavioral and attitudinal information on individuals within corporate settings and develops strategies for effective leadership, teamwork and entrepreneurial success. His clients have come to know him as their go-to source for behavioral and attitudinal issues within the framework of business, family, and career intensions.



Dan Carlin, M.D.

Integrating Today's Health Care with Tomorrow's Genetic Science

Creating the 106-Year Lifespan

Dr. Dan Carlin will present a compelling review of recent advances in connected healthcare and their integration with individual genome data to create a personally actionable plan to dramatically lengthen your lifespan. He will also discuss the profound implications, both personal and professional, for wealth managers and their clients.

Dr. Dan Carlin is founder and CEO of WorldClinic, a medical concierge 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 concierge healthcare.

John Bowen

Being Successful on Purpose

The right approach and the right tools will put your practice on a clear success path that will yield the results you want for your clients, your team and your family.

Excelling in Turbulent Times: The Opportunities with Private Client Lawyers

Discover how private client lawyers can create exceptional high-net-worth practices in today's challenging environment—and how you can create powerful strategic partnerships with them for your mutual benefit.

John Bowen is the founder and CEO of CEG Worldwide, the world's leading coaching firm for financial advisors. For more than 15 years, Bowen and his team have had the privilege to coach elite financial advisors on new ways to deliver groundbreaking wealth management solutions to their clients. Previously, he worked directly with affluent clients as a financial advisor for 26 years, managing up to $2 billion in assets.

Jonathan Powell

Creating Distinction

How to Set Yourself Above All the Rest

As you move up the success path from financial advisor to wealth manager and then elite wealth manager, you need tools for creating distinction. This presentation will show you how to gain an unfair advantage over your competition.

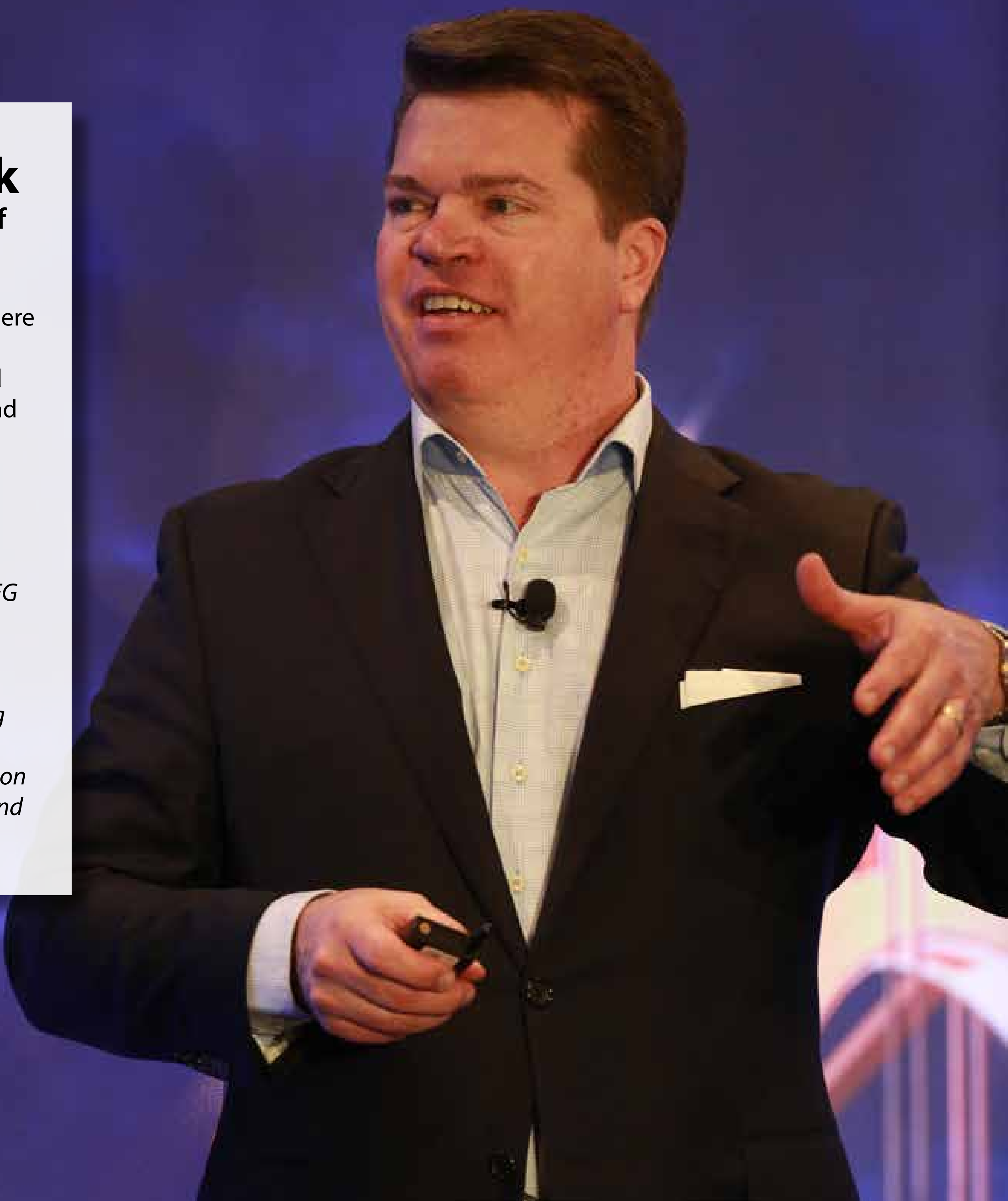
Jonathan Powell is a senior managing principal at CEG Worldwide. Working with many of the nation's top financial firms, he enjoys helping financial advisors transform their professional and personal lives by implementing CEG Worldwide's research-backed principles.

Paul Brunswick

Leading Through Times of Transition

Understand the three areas where affluent clients are most likely to be affected by new laws and policies— taxes, regulations and health care—as well as actions to take to help clients capture opportunities in the changing environment.

Senior managing principal at CEG Worldwide, Paul Brunswick has more than 25 years of financial services experience. With a proven track record of impacting institutions and top financial advisors, he builds communication strategies that attract affluent and ultra-affluent clients.



MAY 2017 PROGRAM

Wednesday May 3

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 • Building a Clear Vision and Plan for Your Success —Paul Brunswick • Niche Marketing: Professional Network Meeting Mastery —Jonathan Powell • Expand Your Reach with Targeted Presentations —John Bowen
6:00 p.m.–8:00 p.m.	Welcome reception. You are welcome to bring your spouse or other guest.

Thursday May 4

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.	Opening—John Bowen
	Brilliant Execution—Jonathan Powell
	Being Successful on Purpose—John Bowen
	Leading Through Times of Transition—Paul Brunswick
	Excelling in Turbulent Times: The Opportunities with Private Client Lawyers—John Bowen
	The Economic Glue in Advanced Planning—Frank Seneco
	10X Talks—$180,000+ Ideas
	Facilitated Networking Exercise—John Bowen
Noon	Networking Lunch
1:30 p.m.	Integrating Today's Healthcare with Tomorrow's Genetic Science: Creating the 106-Year Lifespan—Dan Carlin, M.D.
	Breakout Session I
	10X Talks—$180,000+ Ideas
	Executing for Results—John Bowen
5:00 p.m.	Close
5:30 p.m.	Reception
6:30 p.m.	Dinner at the hotel with a presentation by John Naber, Olympic gold medalist and sports broadcaster. You are welcome to bring your spouse or other guest.

Friday May 5

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—John Bowen
	Leadership and Self-Understanding—Steve Sisler
	Creating Distinction: How to Stand Above All the Rest —Jonathan Powell
	Breakout Session II
	10X Talks—Results of Voting
	Facilitated Networking Exercise—John Bowen
	Seizing 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
	• Harvesting Great Client Introductions—Jonathan Powell
	• Building a Successful Enterprise—Paul Brunswick
	• Scaling Up to $1 Billion and Beyond—John Bowen and Jon Stone *(This session is by invitation only.)*

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

Breakout Sessions

Roundtable breakout sessions delve deep into the topics that can make a significant difference in your practice. They are practical, hands-on and focused strictly on results. Here are some of the session we have planned:

Your Behavioral Orientation

with Steve Sisler

Steve Sisler, in a follow-up to his keynote presentation, will guide you in how to examine and interpret your own mindset and behavioral patterns as you interact with those around you. Expect thought-provoking insights that enhance how you lead your clients and team.

The Rainmaker Multiplier

with Julie Sendelbach

If you're tired of being the sole driver of new business in your team or practice, you're not alone—many advisors face challenges in training and motivating their Gen 2 and Gen 3 partners to attract new clients. This breakout session provides the specific steps you can take to turn your key associates into true rainmakers.

Connected Genetics Can Get You to Age 106 … So Now What's Your Plan?

with Dan Carlin, M.D.

As a follow-on to his keynote introduction on the integration of connected healthcare and genomic science, Dr. Carlin will present an in-depth review of the three most critical and innovative elements in a lifelong, tech-enabled longevity plan. He will also touch upon the personal and fiscal ramifications of living vibrantly to the age of 106.

The Path to Great Distinction

with Jonathan Powell

Jonathan Powell will dive deep into the specific tools and actions that will take you farther along the success path to elite wealth manager serving the affluent and ultra-affluent.

Using Speaking to Grow Your Practice and Position Yourself as an Expert Financial Advisor

with Joel Weldon

Big money talks. Think of the top money earners in every field. From Warren Buffett to Bill Gates and from sports superstars to business executives and leaders, speaking today means more than just live events. It also means videos for YouTube or your website, podcasts, Skype calls, webinars, and radio and TV interviews. To be a highly effective communicator, you need specific skills. In this session, you'll learn five secrets most financial advisors don't know (and what they don't know is costing them big money.)

Becoming the Leader Your Clients Want

with Paul Brunswick

Paul Brunswick will provide a more detailed understanding of the areas where affluent clients are most likely to be affected by the incoming presidential administration, along with how you can provide the leadership that clients always look for during times of transition.

10X Talks

Some of the finest experts available are your Roundtable peers. 10X talks are a chance for the masters among us to demonstrate how they execute specific strategies at a truly world-class level.

Our goal with the 10X talks is for you to leave with at least one strategy that will return you annual Roundtable tuition 10X.

Bonus Sessions

Breaking Through Tactical Acceleration

Wednesday, May 3, 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.

Professional Network Meeting Mastery

with Jonathan Powell

Discover how to build your lead flow, boost your value promise—and even have more fun—with a successful professional network. Jonathan Powell will focus on the professional network meeting and how to transition the right network members into true strategic partners, along with a look at how to work effectively with the experts in the Roundtable Family Office Network.

Building a Clear Vision and Plan for Your Success

with Paul Brunswick

To have the practice you want, you need to know exactly where you are going and have a defined plan for getting there. Paul Brunswick will detail how to define your goals and set achievable milestones to keep you and your team on track to your next level of success.

Expand Your Reach with Targeted Presentations

with John Bowen

CEG Worldwide has created powerful client presentation tools to help you accelerate your success in attracting your ideal clients. John Bowen will set out exactly how to use these tools with three types of presentations: private client events for your own clients and prospective clients, events where you are the guest speaker and events conducted with strategic partners.

Focused Results Groups

Friday, May 5, 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.

Harvesting Great Client Introductions

with Jonathan Powell

Master your second-opinion service, discover the secrets for client events that wow and yield qualified prospective clients and get ideas that will surprise and delight your advocates.

Building a Successful Enterprise

with Paul Brunswick

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

Scaling Up to $1 Billion and Beyond

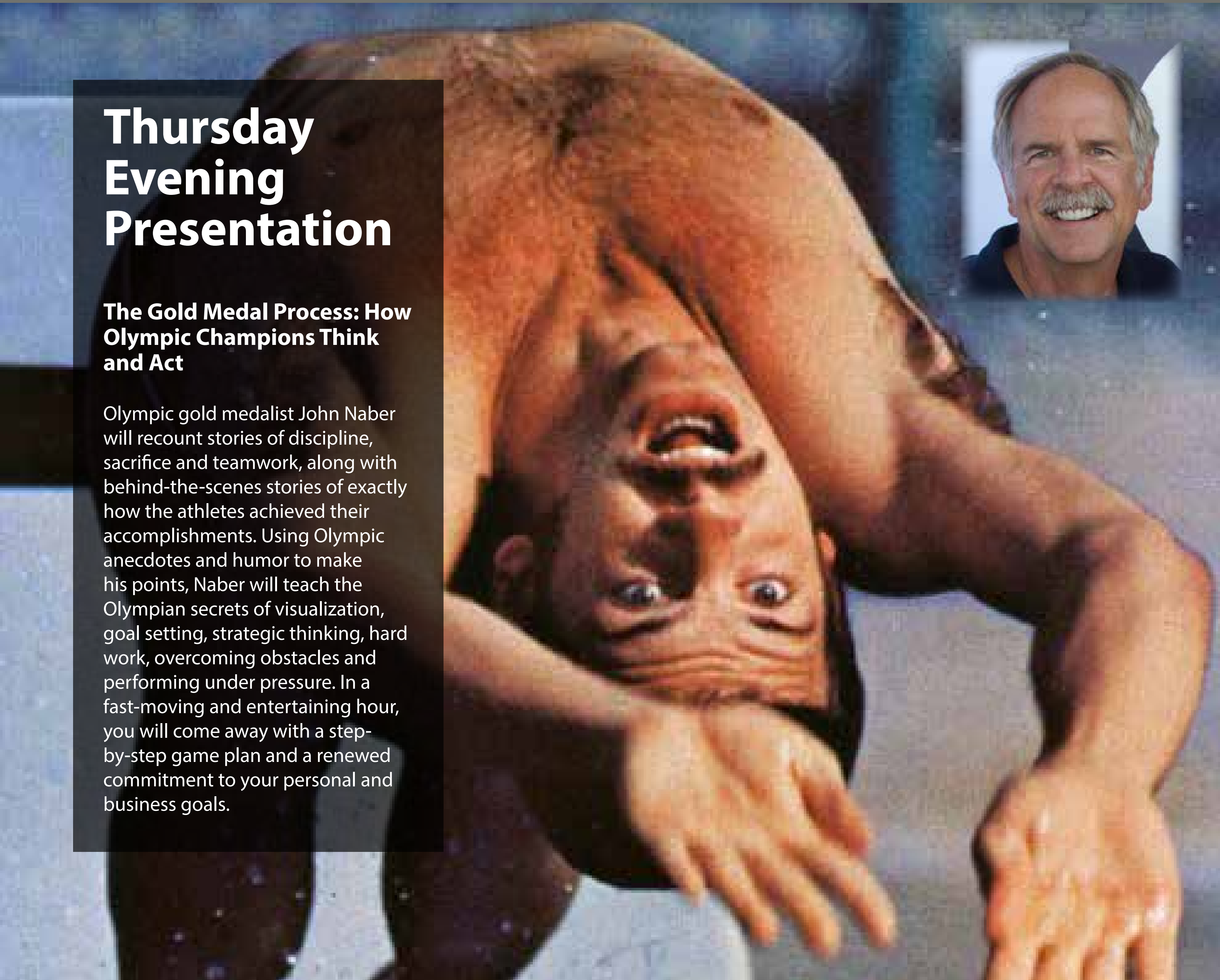
with John Bowen and Jon Stone

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** Led by master facilitator Bob Niederman, will guide your 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 Olympic gold medalist and sports broadcaster John Naber. 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

The Gold Medal Process: How Olympic Champions Think and Act

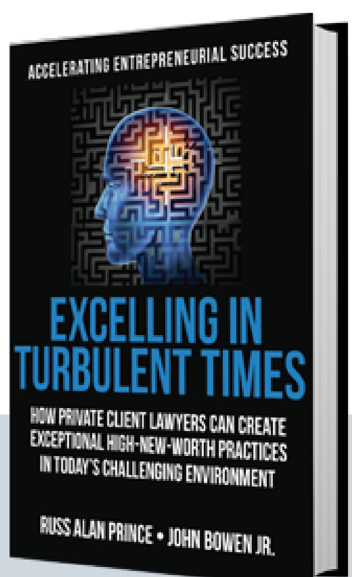
Olympic gold medalist John Naber will recount stories of discipline, sacrifice and teamwork, along with behind-the-scenes stories of exactly how the athletes achieved their accomplishments. Using Olympic anecdotes and humor to make his points, Naber will teach the Olympian secrets of visualization, goal setting, strategic thinking, hard work, overcoming obstacles and performing under pressure. In a fast-moving and entertaining hour, you will come away with a step-by-step game plan and a renewed commitment to your personal and business goals.

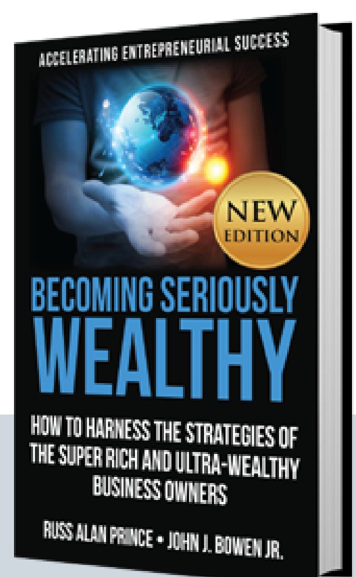
Powerful Tools for Moving Upmarket

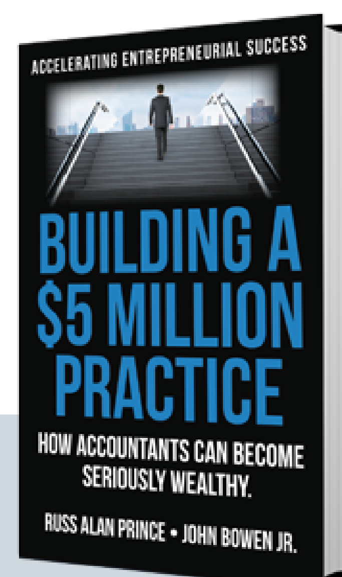
CEG Worldwide is providing a series of authoritative books and supporting presentations aimed at the most profitable client niches and strategic partners. Each book can be customized with your own foreword to reinforce your credibility and create opportunities to get in front of key client audiences and potential strategic partners.

Building on our success with *Becoming Seriously Wealthy: How to Harness the Strategies of the Super Rich and Ultra-Wealthy Business Owners*, we will release the next book in the series at the session. *Excelling in Turbulent Times: How Private Client Lawyers Can Create Exceptional High-Net-Worth Practices in Today's Challenging Environment* will give you an effective entry point into the profitable world of private client lawyers.

We will follow these up with an all-new and updated version of *Becoming Seriously Wealthy* in October 2017 and, in May 2018, *Building a $5 Million Practice: How Accountants Can Become Seriously Wealthy*. In all, you will have a robust set of tools for moving upmarket to serve ever-wealthier clients.







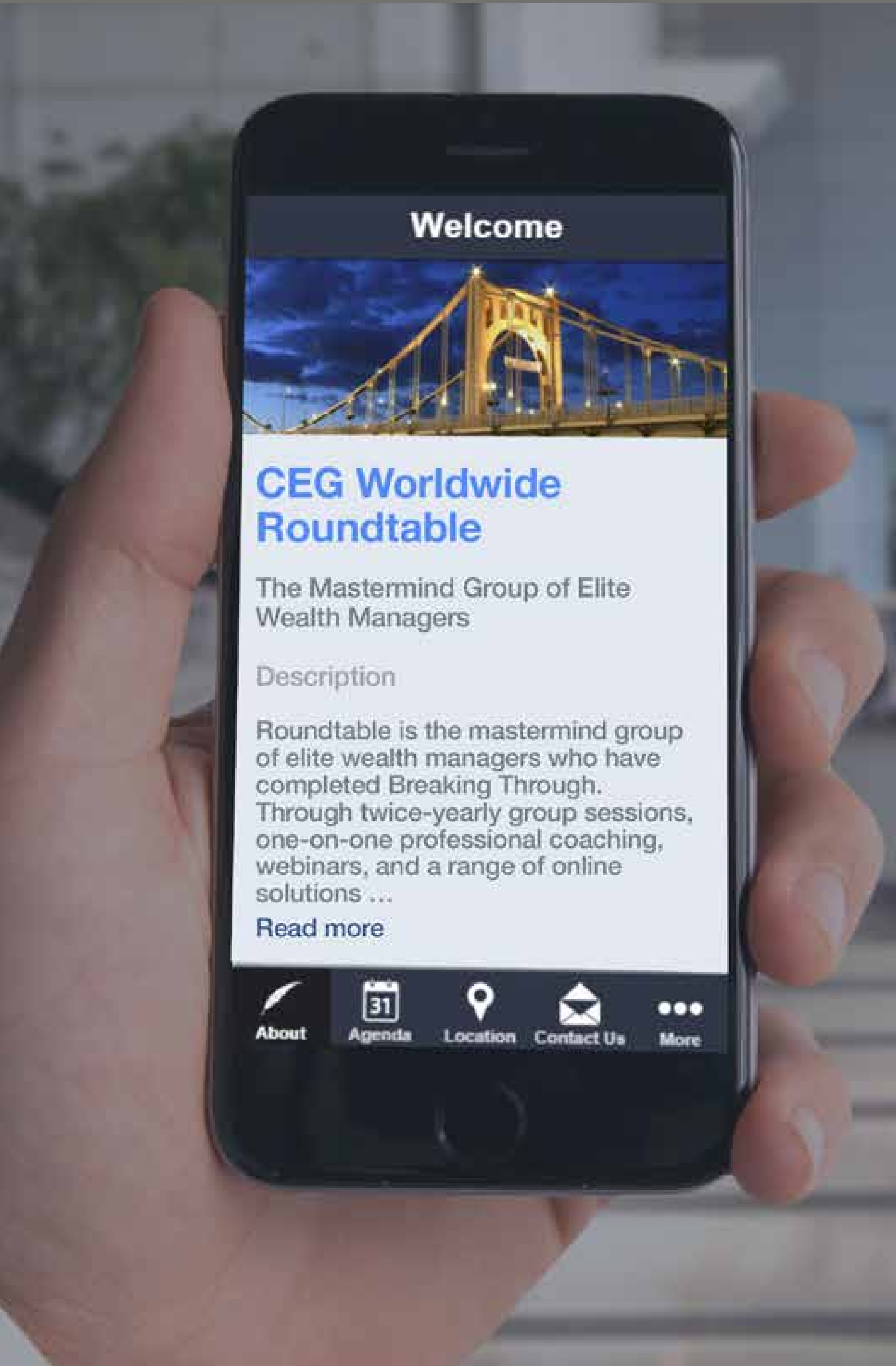
Hotel Information

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. You must book your room by March 28, 2017, to be guaranteed 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."



Get the App

The Roundtable app is designed for the iOS and Android devices. Gain real-time session information including the agenda, location information, contact information and alerts, free from the App Store or Google Play on your mobile device or by visiting this link.

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

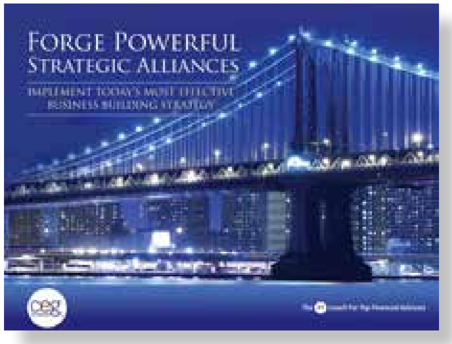
The financial challenges of your ultra-affluent clients range far beyond investment management. The Roundtable Family Office Network includes the top experts in every area of advanced planning and coordinates their work through the Global Advanced Planning Desk. With the Roundtable Family Office Network, 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:

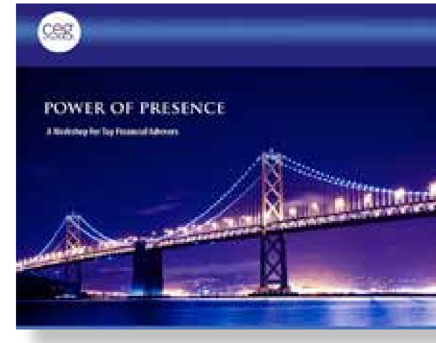
- **Forge Powerful Strategic Alliances** has one goal: to help you quickly establish at least one new strategic alliance that will generate at least one new highly qualified affluent client every quarter. With videos, tools and on-demand webinars, this program provides you with everything you need to build effective strategic partnerships.



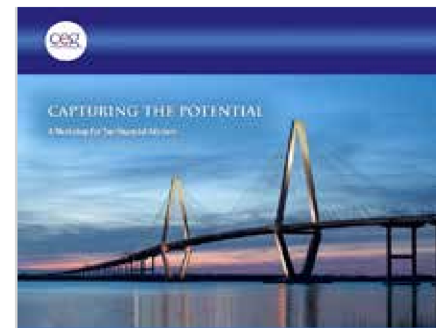
- **Attract the Affluent** sets out seven simple strategies for attracting your ideal clients and then helps you execute each strategy throughout the program. This robust program includes extensive videos, on-demand webinars and numerous downloadable tools.

- **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.

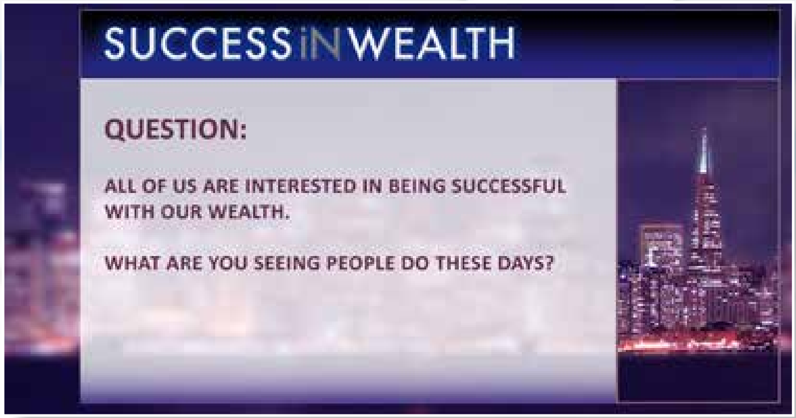


Video Opportunities

You will have the opportunity at the May 2017 session to participate in an HD-quality video production. You can 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.

The studio is 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. However, time slots are reserved on a first-come, first-served basis, so secure your space when you register for the session.



Professional Portraits

We know how important it is to have professional headshots for all your marketing efforts, including your web site, LinkedIn profile, brochures and other collateral. At the October 2017 session, we will have a portrait photographer standing by to create your professional headshot—free of charge.

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.

WorldClinic
Continuous Connected Care
www.worldclinic.com

Roundtable
Family Office Network
www.roundtablefamilyoffice.com

Bluefish
Concierge
www.thebluefish.com

Book In A Box
www.bookinabox.com

www.successcomesincans.com

RuhlinGroup™
www.ruhlingroup.com

Financial Advisor Select, LLC
www.financialadvisorselect.com

AESNATION.COM
ACCELERATING ENTREPRENEURIAL SUCCESS
www.aesnation.com

“I cannot imagine being in this business **without CEG as my partner.**”

—Rich Schuette, Roundtable member for nine years

“Roundtable is a fabulous opportunity to accelerate your business growth and **live the life that you’ve always wanted to live.**”

—Stacy Francis, Roundtable member for two years

“It is **worth the tuition** many times over.”

—Robert Pyle, Roundtable member for five years

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