CEG Program Talking Points

Breaking Through:

Breaking Through is CEG Worldwide's intensive 12-month coaching program for top financial advisors.

We have found that the leading financial advisors—and those aspiring to the elite level—have three important goals in common.

• **Increasing your client impact**. Foster long-term client relationships, create a steady stream of introductions to additional potential clients and effectively set you apart from competitors.
• **Growing your assets and income**.
• **Improving your quality of life**. By building a simple, elegant wealth management business, you can reduce your stress and workload, create a healthier work-life balance and have more time for family and friends. And your increased income can enable you to provide the lifestyle you want for yourself and your family.

Live sessions: Three, two-day sessions bring together Advisor, coach, CEG Worldwide senior principals and elite advisor peers. Through discussion, lecture and exercises, you master the best practices of today's most successful advisors.
Professional coaching: monthly during one-hour, one-on-one phone calls.
Breaking Through Online: This robust web site provides a library of more than 100 in-depth videos, step-by-step instructional content and dozens of downloadable tools
Interactive webinars: These hour-long, quarterly webinars reinforce what you learn during the live sessions while delving deeper into key actions that will drive early results.
Weekly emails: Provides a concise compendium of tips to keeps advisors focused on the actions you should be taking in real time.
Peer coaching: You will provide and receive coaching from your peers throughout the year to help track goals, overcome barriers and identify opportunities.

Access to CEG Worldwide principals: Each is a former top financial advisor or institution executive who understands the nuances and complexities of running successful practices. Collectively, they have coached thousands of top financial advisors.

Roundtable

To reinforce what you learned in Breaking Through and help you implement those the select strategies that will be most effective for you and your practice. Continue to network with high level advisors to gain unique ideas and approaches to executing the strategies most effective for your practice.

• **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 your momentum as you reach ever-higher goals.

• **Interactive 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

• **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.

Online Bonus Programs

• **Forge Powerful Strategic Alliances** Help 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** 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** 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** 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.

Bonus Marketing Tools

In addition to the professionally produced videos described above, we have a portrait photographer standing by at one session each year to create professional headshots—free of charge. You can use these images for a variety of marketing purposes, including your web site, brochures and other collateral.

To help you convey your true value as a wealth manager to clients and prospective clients, we offer complimentary customizable whiteboard videos. The first video describes the wealth management formula in a unique and enjoyable way. This is followed by a series of five videos, each describing one meeting in the wealth management process. You can be sure you competitors have nothing like this

Roundtable Family Office Network

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 National 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.

How to access the network

Access to the Family Office Network is available to every current Roundtable member.

• **Lifestyle services**. Each of the network's lifestyle services experts will offer a platform that will enable you to directly access their services for your clients. There may be a nominal charge for access to some services. For more information, visit www.roundtablefamilyoffice.com.

• **Advanced planning services**. Access to these services is exclusively through the National Advanced Planning Desk, managed by Russ Alan Prince. To use the Advanced Planning Desk, you must have the ability to share life insurance revenue. Clients must have a minimum of $25 million in investable assets for their cases to be handled through the Advanced Planning Desk. For more information, visit **http://www.cegworldwide.com/e/planning-desk/introduction**

In addition, you will enjoy many opportunities to gain specialized knowledge in each of the lifestyle and advanced planning areas. These will include presentations and breakouts during Roundtable sessions as well as invitation-only webinars.

National Advanced Planning Desk

An overview from John Bowen and Russ Alan Prince

CEG Worldwide has joined forces with Russ Alan Prince, leading authority on the ultra-affluent and international expert on family offices, to assist Roundtable members in providing advanced planning solutions to your ultra-high-net-worth clients.

If you are currently a member of Roundtable and have the ability to share life insurance revenue with CEG Worldwide, you qualify to use the National Advanced Planning Desk.

There are two components to the process:

1. **Case assessment.** Russ Prince will review your client case with you to identify potential advanced planning solutions. He will also help identify any additional investment management business that can be done with the client and referrals that could be garnered from the client. Assuming that there are opportunities to provide advanced planning solutions, Russ will then work with the appropriate specialist(s) to identify potential solutions.
2. **Coaching on client presentations.** Russ will help you to structure and present the advanced planning solution(s) to your client. This will typically be a back-and-forth process between you and Russ that proceeds until the client makes a clear decision about the proposed solution(s). It may include steps to position yourself effectively with the client, the creation of presentation materials, and other actions necessary to successfully communicate the proposed solution(s).