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CEG Worldwide Article Advises on Private Client Events

Advisors can reap the rewards of group presentations—but only if they keep them tightly focused.

SAN MARTIN, CA—May 1, 2011—CEG Worldwide, the leading coaching, consulting and research firm for elite financial advisors, has announced the publication of "Going Private," an article by John J. Bowen Jr. in the May issue of *Financial Planning* magazine. Bowen is the founder and CEO of CEG Worldwide.

Seminars have a bad reputation among advisors because they take a lot of time and money to assemble and lead to little or no new business. But in a recent article, Bowen shows that these events can be very profitable—*if* advisors plan them correctly.

For example, be selective in your invitations, advises Bowen. Send invitations to your events only to existing clients or to individuals who are qualified for your service. Keep in mind "affinity groups"—associations, clubs or other organizations of people who share a common interest or goal. "The leaders of many of these groups are always looking for ways to add value to their members—something you can do through your events," says Bowen.

Once you have the right people, be sure to engage your audience. For example, advises Bowen, "Hand out blank personal action summaries to all attendees. As you present your content, encourage them to write down the actions they feel they should be taking to address their financial issues. This will make them more inclined to follow through on your invitation to meet with you."

The complete article, and other articles by Bowen, is available at www.cegworldwide.com.

About CEG Worldwide, LLC
CEG Worldwide is passionate about coaching financial advisors and institutions to build a Simple and Elegant Wealth Management Business℠. Using state-of-the-art research methodologies and analysis

combined with proven strategies and tactics for building highly successful advisory practices, CEG Worldwide provides uniquely powerful insight into what allows elite financial advisors to thrive.

CEG Worldwide delivers fully scalable financial advisor training programs at many of the world's largest financial institutions. The firm's proprietary institutional strength intelligence is based upon empirical studies of more than 10,000 advisors and 14,000 high-net-worth individuals. By combining research expertise with pragmatic and proven business experience, CEG Worldwide helps institutions achieve measurable gains in productivity, retention and assets under management and provides advisors with proven business-building strategies and tactics.