

Ignite Your Practice: Surefire Ideas from Industry Trailblazers



Ron Carson



**Scott Hanson
&
Pat McClain**



Don Patrick





Ron Carson

Ron Carson is President of Carson Wealth Management Group, a comprehensive wealth planning firm, and founder of PEAK, a coaching program for financial advisors, both based in Omaha, NE.

With over 25 years of experience and more than \$2 billion in assets under management, Ron is one of the country's most successful and respected advisors. Most recently, Registered Rep magazine picked Ron as the number one independent advisor in the country. For five years, he was selected by Worth Magazine as one of "The Best 200 Financial Advisors" in the country. Barrons, the last four years, has ranked Ron one of the nations top advisors.

In addition to his planning practice, Ron is recognized as one of the country's top trainers for financial advisors. He has shared his success principles, as documented in his book, *Tested in the Trenches*, with audiences worldwide. Most recently Ron co-authored the New York Times best selling book *Avalanche* and the blueprinting process that goes with it. Together these tools help advisors learn how to clarify their mission, vision and values by setting business and life goals.

He joins us today in hopes of helping you develop your practice and enhance your quality of life.





**Scott Hanson
&
Pat McClain**

Scott Hanson and **Pat McClain** are senior partners and founding principals of Hanson McClain Advisors, Inc. They are nationally known financial experts, regular speakers at industry conferences and have each been recognized multiple times by Registered Rep magazine as being among the top forty advisors in the country.

In 2006 Scott was chosen by Research magazine for induction into the publication's Advisor Hall of Fame. He is also the author of *Money Matters: Essential Tips & Tools for Building Financial Peace of Mind*. Together, Scott and Pat host Money Matters, a weekly call-in-talk radio show covering investment and financial topics. The show airs on Sacramento's largest AM radio station.

In addition to their financial service practice, Scott and Pat team with other advisors across the country to provide marketing, administration and operations advice. This program has served hundreds of independent advisors and has helped many advisors make dramatic improvements in their practices.

In March 2004, Scott and Pat formed Liberty Reverse Mortgage, Inc., to serve the growing number of seniors taking advantage of reverse mortgages. In just a short time, Liberty Reverse Mortgage grew to be the third-largest reverse mortgage company in the country and was acquired by Genworth.





Don Patrick

Don Patrick brings over two decades of experience advising individuals, professionals and businesses in a wide range of financial matters, from risk management, investments, and taxes, to general business consulting.

Don is Managing Director of Integrated Financial Group – an elite consortium of independent financial planners. It is one of the largest and most successful independent financial planning firms in the country.

Recently Don was recognized by On Wall Street magazine as being one of the industry's top ten branch managers.





The biggest bear market is trust.....

Bear market creates opportunity.....



2009 should be a career year.....





Create Proactive Communication





Develop a Marketing Plan





Manage Your Business Like a Business





Top Three:

(1) Do What You Say You Will Do

(2) Be Politely Aggressive

(3) Upgrade Your Staff





Top Three:

(1) Write & Publish Your Core Values

(2) Own Your Time

(3) Spend Extra Time With Top 20%





Top Three:

- (1) Focus on Referrals**
- (2) Seek Money in Motion**
- (3) Focus on Client Goals – Not The Markets**



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Question & Answer

