PEACE OF MIND
P L A N N I N G

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Day 1-In Person Training

8:30AM – 10:00AM **1. NOW IS THE TIME!!**

2. Philosophy
   - **What is Your Value Proposition to a Prospect That Makes You So Different and Separates You Tremendously from Your Competition?**
   - **Offering a "Conservative Money Management System" Not a Product**
   - Teaching Advisors How to Be **"Field Savvy:**
   - We are the "Low Risk, Low Volatility Advisor" with a High Probability of Investment Success
   - Keeping Clients **Out of Harm's Way** But Providing Excelling Rates of Return Over Time, 5, 10, 15 Years+
   - **A UNIQUE SELLING PROPOSITION** to the retiring American Public
   - Follow the **"System"** and you will be successful
   - **Win! Win! Win!**

3. The **"FINANCIAL MANUFACTURING FIRM"** Marketing—1st Meeting—2nd Meeting—Portfolio Dismantling (Wedge Building) - 3rd Meeting—Transfer Process
New Business Process
Duplicate & Repeat

4. Successful Marketing Ideas From Our Advisors (ELITE Advisor Examples)

- 45-60 Day Sales Process Per Client
- 20-25 First Meetings Per Month
- 8-14 New Clients Per Month

It's Up To You!

10:00AM – 0:15AM ***BREAK***

10:15AM – 11:45AM

5. 1.99% Fee!! – Daily Tactical Portfolio Management vs. Buy and Hold and Hope and Pray

6. The Details of the POM Planning Low Risk & Low Volatility Investment Management Platform. **PLUS UP TO 17 EXCITING PORTFOLIOS AND 11 MUTUAL FUNDS.**

- **"It's Not How Much You Make, It Is How Much You Protect Against Catastrophe."**
- **Manager Fact Sheets**
- **Sleeve Management**—Why is it Powerful?
- Why **Aggregate Manager Performance** is so important?

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7. A Simple, Independent, Easy To Understand **Third Party Portfolio Analysis—NEVER FEAR**

ANY BROKERAGE STATEMENT AGAIN!7. GREAT POM Planning PROPRIETARY SOFTWARE COMPARISON OF POM PLANNING MANAGERS TO STOCKS, MUTUAL FUNDS, ETF'S, ETC. - "The Nail In The Coffin" - Sleeve Combo's are Excellent!!

8. **The No Load Variable Annuity**

- **How To Possibly Turn $500,000 Into $14M**
- Tax Deferral Combined With Legacy Planning
- Multiple Managers in one contract – Only with POM Planning & TCA
- Control from the Grave!!

9. **Real Return vs. True Average Return Analysis**

10. **Training + Knowledge + Affirmation = Confidence, Conviction & Huge Success**

11:45 – 12:00 PM ***GUEST SPEAKER –*** **Blair Schadler | Wealth Preservation Institute | Roccy DeFrancesco**

LUNCH & VISIT NEW POM PLANNING, OFFICES
Meet New Business, Marketing, Compliance & the rest of the POM Planning Team

1:30 –PM – 2:00 PM **OnPointe – RISK MANAGEMENT SOFTWARE COMBINED WITH OUR MANAGING RISK 3 BUCKETS**

2:00 –PM – 2:15 PM **The Power of the ASSET REPOSITIONING PAGE**
FINANCIAL REVIEW PROCESS

- Quarterly Performance Reporting & Billing - Multi Managers in one Account

2:15 –PM – 2:50 PM **GUEST SPEAKER –| Top 12 Elite Advisor with POM Planning Management**

2:50 –PM – 3:00 PM ***BREAK***

3:00 –PM – 3:30 PM ***GUEST SPEAKER – POM Planning Manager #1***

3:30 –PM –4:00 PM ***GUEST SPEAKER – POM Planning Manager #2***

4:00 –PM – 5:00 PM ***GUEST SPEAKER – POM Planning Manager #3***

5:00 –PM – 4:15 PM **WRAP UP! – Great Videos and Cartoons**

DINNER—MEET IN LOBBY TO GO TO ***MONTGOMERY INN RESTAURANT***

PEACE OF MIND
PLANNING

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Day 2-In Person Training

8:30AM – 10:00AM

1. **POM Planning Retirement Planning College Course**
2. **NEW Marketing Opportunities!**
3. **DOL REGULATION – PRESENTATION**
   - **POM – SUPERVISING FINANCIAL INSTITUTION**
   - **BICE AGREEMENT OR BIA?**
   - **LEVEL FEE ADVISORS**
   - **PROHIBITED TRANSACTIONS**
   - **IMPARTIAL CONDUCT CODE – DISCLOSURE FORM**
   - **CARRIER AND IMO ADOPTION FOR BEST PRACTICES**
   - **FEE BASED FIA'S – WILL THEY WORK?**

9:30AM – 10:30AM ***BROKERAGE STATEMENTS ANALYSIS:***

- **Destruction And/or Dismantling** The Competitors Statements
- What Buffett and Former SEC Chairman Arthur Levitt Say About Brokers
- Building Wedges

10:30AM – 10:45AM ***BREAK***

10:45AM – 11:30AM

4. **TAX RETURN ANALYSIS**— "The Window to the Clients Financial Soul"
5. **"THE MUNICIPAL BOND BLOW UP" - Why most retirees should not own individual municipal bonds.**
6. How to Get Higher Annuity Sales & AUM Lifetime Income with the POM Planning Investment System
7. Summarize & Review The 3 Meeting Process

11:30AM – 12:00PM ***Great New Technology*** **- GREAT NEW CRM, WORKFLOW PROCESS & PERFORMANCE REPORTING SOFTWARE "ALL IN ONE" – JESSICA VIERLING**

12:00PM – 1:00PM **LUNCH**

12:00PM – 1:00PM **WRAP UP!**

8. Succession Planning
9. Sabotage Success Syndrome (SSS)
10. **ACAT Process**—Never Liquidate & Send Cash from a Brokerage Firm
11. "Take The You Out Of Your Practice"
12. Fiduciary Standard of Care
13. Wedge Building
14. E-Mail News/Pertinent Subjects
15. Final Q&A