



**LEADING  
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## Audience Testimonials

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### IFB Conference - Toronto, ON – May 26 and 27, 2009

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*"I was impressed with Simon's level of understanding on the value of generating leads in business."*

**Duncan Presand**  
Assante

*"I am inspired to immediately work on my parables; great advice."*

**Dave Broostad**  
Full Circle Benefits Group

*"Very accurate topics for this time in my life. After 20 years in the industry, I have a new passion about the business and how to handle stresses associated with it."*

**John Stapleton**  
Stapleton Insurance

*"I was impressed with Simon level of understanding on the challenges facing Financial Advisors. I was provided with actual answers which I can immediately apply to the business."*

**Smita Patel**  
Impact Insurance Brokers

*"I was provided with actionable ideas. These ideas can be related to business and personal life."*

**Peter Daly**  
Raymond James

*"Simon made me think about and appreciate the importance of setting a more definite plan."*

**Diane Huba**  
Freedom 55 Financial

*"The workshop showed me the solution to my life and personal problems."*

**Robert Baker**  
Freedom 55 Financial

*"I felt the enthusiasm and passion for self improvement and practical management. Through the use of wit Simon focused on the issues and challenges that are in the back of most advisors minds."*

**Darren Abrahams**  
Steven Cohen Insurance Agency Inc.

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## Audience Testimonials

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Advocis Newfoundland Labrador – St. John's, NL – May 22, 2009

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*"It opened my mind to my hopes and recognized my fears but inspired me to persevere. You have provided me with a renewed commitment to purpose and focus."*

**Cyril Rogers**  
London Life

*"I can see how it would take you to the next level."*

**Steve Macdonald**  
Freedom 55 Financial

*"I received practical planning ideas which can be used in my client process."*

**Tony Rogers**  
Freedom 55 Financial

*"I realized that unmet needs should NOT determine my happiness or goals in life."*

**Freeman Hannaw**  
Hannaw Insurance Services

*"I walked away with a real feeling of passion and enthusiasm about the business I am in. "*

**Marcus Penney**  
Freedom 55 Financial

*"I was able to clarify what was holding me back and understand my own Roadblocks to Success."*

**Lona Hannam**  
Freedom 55 Financial

*"Best evaluation of beliefs and values that I have ever seen."*

**Michael Kidney**  
Great West Life

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## Audience Testimonials

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### Investors Group – Nanaimo, BC – May 7, 2009

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*“Great information. What and how to develop a plan for success, great energy!”*

**Ray Sapergia**

Investors Group

*“Great ideas and delivered with such enthusiasm!! Everything made perfect sense. Fabulous referral ideas, and understanding the ‘self’.”*

**Pat Dennison**

Investors Group

*“Thinking outside the box with business planning. The understanding of how to acknowledge that unmet needs must be addressed to ensure business success.”*

**Sarah Rycroft**

Investors Group

*“Vision, passion and so powerful. Tremendous energy.”*

**Brent Stetar**

Investors Group

*“I really enjoyed how enthusiastic Simon was, he really puts things in perspective and provided me with enlightenment.”*

**Andrew Lewis**

Investors Group

*“Energetic, informative, motivating – really made me think. New ideas on how to grow my business.”*

**Kol Jepson**

Investors Group

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### Advocis Saskatoon – Saskatoon, SK – April 29, 2009

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*"It stimulated my thinking at a time when I need to reinvest my business going forward."*

**Barry MacDonald**

Dundee Securities Corp.

*"Relating the inner to the outer. Your passion shines through when speaking."*

**Melody Smith**

Great West Life

*"Love the energy. Really got me inspired at working on my business. A great new outlook for going forward, and really great insight into values and the relationship to business."*

**Darren MacDonald**

Dundee Securities Corp.

*"Lots of enthusiasm – great delivery – great ideas, you are very passionate about what you are delivering."*

**Jack Comean**

Comeau Financial Inc.

*"The energy and ideas he gave us to be the best we can be was fabulous. He motivated us about our own feelings and values and to do a business plan and work on our vision for our business."*

**Laurie and Jim McKay**

Freedom 55 Financial

*"I loved your humor and enthusiasm – the way you presented. You speak the truth about a lot of things regarding our attitudes, you hit the nail straight on the head."*

**Mary McGregor**

McGregor Financial Inc.

*"The motivation I have received today that I will bring to all aspects of my life, not just business. You are very knowledgeable on a field I have heard so much about, but have never experienced in a presentation forum."*

**Gabe Mackesey**

Freedom 55 Financial

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### Advocis Vancouver Island – Victoria, BC – March 26, 2009

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*“Relevant and timely material. This was not a bunch of hype, but instead was very useful. You delivered, and then some!”*

**Neil Hanson**

Sun Life Financial

*“Emphasizes planning and goal setting with a focus on the big picture and downplays the recession – it is a state of mind. The systems Simon has are very good, great information for all advisors.”*

**Brian Prochnicki**

Investors Group

*“Great energy, thought provoking material with practical actions to be taken in my business now, and you offer great insight into a referral script.”*

**Victor Skaarup**

Investors Group

*“Fresh ideas, great energy, and your material is different! Very applicable to everything, not just business, and I really like how your material gets right to the root of the issues that advisors are facing in their business.”*

**Harvinder Samra**

Desjardins Financial Security

*“Great connections with the audience and great material. Simon doesn’t sugar coat, he gets right to the heart of the problems advisors face in business.”*

**Larry Taylor**

Sun Life Financial

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## Audience Testimonials

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### Financial Management (AB) – Calgary, AB – March 12, 2009

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*“Positive, practical, probing, motivating, and empowering. It reminded me to get on my game again and to focus on my business plan, on 90 day goals, to define my values in a daily journal.”*

**Darren Hinz**

Harvest Financial

*“Good reminder that there is hope! I appreciated your enthusiasm, relevant and applicable business information.”*

**Sharon Lepine**

Financial Management North

*“Simon goes to the root causes and provided insight into how we can improve ourselves and our businesses as a result of that.”*

**Glen Griffiths**

McClary Financial Inc.

*“Enjoyed Simon’s passion and understanding of what we are all feeling like inside. I appreciated knowing that I am not alone in this industry and there are solutions.”*

**John Couture**

Legacy Capital Management

*“This was not the “typical” self improvement garbage. This presentation has substance and makes sense!”*

**Ken Godfray**

Legacy Capital Management

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### Financial Management (BC) – Vancouver, BC – March 10, 2009

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*“Possessed deep understanding of our issues as planners. Provided advisor specific approach to dealing with business issues.”*

**Peter Garat**

Garat Financial Group Ltd.

*“Very motivational presentation. Inspires great confidence and love for my profession.”*

**Sonia Sopena**

Financial Management (MGA)

*“Really effective content & information complemented with energy and enthusiasm. Great insight into values and unmet needs. I have a better understanding of how values build your vision.”*

**Desiree Dupius**

Three Sixty Financial Group

*“Great energy! I realized that I need to revisit my values and how they really do work into my business and affect my clients.”*

**Kelly Strongitharm**

Three Sixty Financial

*“It is refreshing to hear something beyond product information. I’ve never heard about “unmet” needs before. Very interesting!”*

**Eileen Luongo**

Noble Benefits Inc.

*“Inspiring. Great way of putting it all together! It helped organize my mind.”*

**Lynne Zlotnik**

Lynne Zlotnik Wealth Management

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### Advocis Bay of Quinte – Belleville, ON – January 16, 2009

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*"It was an energetic, honest and to-the-point presentation that re-affirmed what needs to be done...rediscover the passion!"*

**Jane Simpson**

Jane Simpson Financial

*"Understanding the roadblocks - this is easier with a guide and that's exactly what Simon was! Who do you need to become to receive what you want – great information just like the concept that the needs must be met."*

**Judy Timpson**

Independent Planning Group Inc.

*"Discovered information that related to me more than I thought it would. Great energy and advice."*

**Matthew Dewey**

Industrial Alliance

*"I found answers, new perspectives and discovered that there is still hope. You connected with the audience and I not only felt comfortable; I believed!"*

**Gail D. Kevan**

Freedom 55 Financial

*"What volume of information and energy you brought! I have a clearer understanding of what I need to do to myself first in order for my business to prosper."*

**Julia Dicks**

Sun Life Financial

*"Great enthusiasm and insight! I look forward to reading your E-Newsletter. I realized how much my negative emotions and reactions are probably affecting my success."*

**Trevor Evans**

Freedom 55 Financial

*"There were concrete suggestions not just generalizations; plus honesty and candor in this presentation."*

**Susan Barrett**

Sun Life Financial

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### Advocis Ottawa – Ottawa, ON – November 20, 2008

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*"Your presentation helped me realize that I'm not the only one struggling with these issues. Honest, in your face, no hiding from reality, you offer great advice."*

**Shawn Warner**

Hillier & Associates

*"Interesting material, you are an inspiring speaker with great energy. This is the most fun I've had at an Advocis Meeting. Great creative ideas to improve my business."*

**Barb Gladwish**

Desjardins Financial Security

*"Open, inspiring, I can relate to the roadblocks from my own past experiences. Great approaches to overcoming some of the hurdles to asking for the business."*

**Brian Erwin**

Michael D. Currey Insurance Agencies Inc.

*"Interesting to think about a plan instead of all the bad news in the market today."*

**Manuel Gaudreau**

Investment Planning Counsel

*"It put into perspective why we do some of the things that we do. Great motivation to talk to clients about tough stuff and asking for referrals."*

**Joe Dakers**

The Co-Operators

*"Clear message in an informative and humorous approach."*

**Bill MacGregor**

Desjardins Financial Security

*"You offer confidence and a positive confident outlook on business today. Great insight, clarity in focus and my purpose"*

**Joseph Lopes**

Desjardins Financial Security

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*"Really glad I came today. Wasn't sure what to expect but you forced me get off my butt and start thinking about my values, my unmet needs and my business plan."*

**Meiz M. Majdoub**

Majdoub Financial Services Inc.

## Funeral Plans Canada 11th Anniversary/Annual Conference - Banff, AB – November 18-19, 2008

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*"I loved the integration of core values and unmet needs - a wonderful approach. And I loved the reminder to ask for referrals and then to follow up in one week. Also the meet with your top 10- 20 clients and find out why they worked with you, how to improve and what surprised them."*

**Kat Downey**

Life Matters  
Aurora, ON

*"It was a great reminder of what I should be doing!"*

**Heather Jackson**

James Reid Funeral Home  
Kingston, ON

*"The enthusiasm that Simon brought to the presentation was fabulous. I really enjoyed the comparison of negative thoughts and emotions to positive results."*

**Thomas Payton**

Funeral Plans Canada  
Kitchener, ON

*"The direct facts about what our roadblocks are in a non judgmental manner. Loved the ideas, concepts and plans that were not driven by SALES and MONEY. Thank you!"*

**Bill Shields**

Mackey Funeral Home  
Lindsay, ON

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### IFB Conference - Toronto, ON - November 4 and 5, 2008

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*"Reinforces what has to be done in order to succeed."*

**Rick Kirkham**

Ken Maynard Insurance Brokers

*"Upbeat, concrete suggestions, no B.S."*

**Rob Allan**

Carruthers Nicol Insurance & Investments Inc.

*"Blending energy, positive reinforcement & audience interaction to maintain the audience's attention."*

**Claudio Cipriani**

Mitchell Sandham Ins Inc.

*"No bullshit honesty and directness. Someone who is walking his talk."*

**David Toles**

Canaccord Capital

*"I heard you speak at the IFB Spring Summit and I got great ideas then and even better ideas now."*

**Eldean Dickenson**

Wheatfield Financial Group

*"Simon is an engaging speaker; if I could have a small iota of his charisma, I'd probably sell more!"*

**Charlene Baker-Suk**

Eagle Ridge Financial

*"Well spoken presenter, felt he was speaking to me, not at me, passionate speaker."*

**Mario Rodriguez**

Knights of Columbus

*"Good presentation with clear information."*

**Jitu Sagare**

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IFG

*"Reminded me of the paramount need for written & verifiable goals over a 90 day period."*

**Zenon Barchynsky**

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### Pro-Seminars – Winnipeg, MB – October 2, 2008

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*"High energy and consistent attitude towards today's problems. Thanks for the answers!"*

**Serril Gunn**

Strategic financial Solutions

*"Information was on target and useable. Really enjoyed listening to your presentation and I can use and will use these tips. Great content."*

**Darlene Kane**

Primerica Financial Services

*"Good content, especially in today's world. You made me look at myself in a new way."*

**Joan Temple**

The Cooperators

*"Rethinking my goals and how to achieve them. Really enjoyed your material on referrals. Forget the fear, and see the people!"*

**Richard Symbol**

Faithlife Financial

*"You have great energy and you engage the audience so well. Great concepts that I can use as an insurance marketer."*

**Richard Phillips**

Federated Insurance

*"Enthusiasm and content of the message and taking out the fear of success was great. I would look forward in reading your material on how to walk the walk and not just talk the talk. Mr. Reilly sends a true strong message."*

**Norbert Collette**

Canada Life

*"Your information is readily usable. Found myself sitting and listening intently, only stopping to write down numerous goals and activities, and plans for myself and the staff. Thanks ever so much."*

**Guy Arnott**

Arnott Financial Services

*"Great positive message about the future of financial services."*

**Linda Garrett**

Desjardins Financial

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### Pro-Seminars – Kitchener, ON – September 29, 2008

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*"You are so real. You dig deep and get to the point of what is troubling advisors. I really enjoyed your presentation, your material is not 'the usual', it is very relevant."*

**Bonnie Wyatt**

*"Great enthusiasm and confidence. Great insight into what advisors are facing."*

**Vito Pisano**

VIP Brokers Ltd.

*"Enthusiasm is great. Thank you for your knowledge, I have greater understanding now."*

**Mark Hunermund**

Hunermund Insurance Services

*"Professional, fast moving presentation and accurate material."*

**John Weber**

Regal Insurance Brokers

*"Inspiring and action provoking presentation. You made me realize I'm doing a lot of things right in my practice."*

**Nancy Davidson**

Freedom 55 Financial

*"Good, well thought out, organized, and your presentation adds values."*

**George Ranisan**

Round Table Financial

*"Great information on the down markets and the coming green economy – I'll use this in my next letter to my clients."*

**Asif Khan**

BMO Nesbitt Burns

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### Pro Seminars - Edmonton, AB - September 17-18, 2008

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*"You are a positive, thoughtful, person and speaker. You gave direct, intelligent advice to our Financial Advisor Community."*

**Bryan Fife**

Desjardins Financial

*"The info about limiting beliefs and how they impact business, is dead on. Your presentation was clear and lucid."*

**Terry Hooks**

Hooks Insurance and Financial Services

*"Your energy is fabulous, I wanted to keep listening, I didn't want him to stop, very engaging presentation."*

**Matthew Fraser**

Silverberg Group

*"Very fascinating, the psychology connection between unmet needs and how it impacts business. Lots of 'meat' in your material."*

**Glenn Humeniuk**

First Prairie Financial Inc.

*"Your energy, and passion comes through. I now know that I can work on some roadblocks in building my business. You've excited me to start learning about building my business, by addressing my limitations."*

**Emili Gomez**

Primerica Financial Services

*"Brought to light the limitations of fear and how it affects my business. I really enjoyed the information on getting back to asking for referrals."*

**Dennis Nicholson**

Dennick Insurance Services

*"Great presentation. Engaging, positive and loaded with highly valuable content."*

**Vince O'Shea**

Investors Group

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### Pro Seminars - Las Vegas, NV - September 8-10, 2008

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*"Interesting, struck a chord in terms of the unmet needs."*

**Dan Conway**

Many Nations Financial

*"Very informative. This will get me back on track with my business. Listening to you improved my self confidence."*

**Wayne Peterson**

Investors Group

*"His perspective on the psychology of why we regress to the position where we find the least resistance, was very interesting. You have given me the conviction to refocus my practice on a few simple but impactful ideas."*

**Kelly Kuspira**

*"Some great idea to use as a basis. Great job at keeping us focused and interested."*

**Jennifer Burnett**

RBC Dominion Securities

*"Thanks for showing us how to overcome a recession."*

**Gerry Avery**

Insurance Toronto

*"Learning that clients won't move unless you first make the change within yourself."*

**Vicki Parchamento**

vickiparchamento @ hotmail.com

*"Reinforces that I am doing the right things. I liked the ideas about the concierge service model for my top clients. "*

**Marc Arthrell**

Clearstone Wealth Advisors Inc.

*"The 106 Tips – great marketing information."*

**Tammy Johnston**

The Financial Guides

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*"Brought to the forefront, if it's going to be it's up to me, and time to get on with it."*

**Iqbal Mann**

Mann Financial Inc.

*"What I liked best about the presentation was the focus and impact on the need to change. You offered a new way of adding value to my existing client base."*

**Lyle C. Lee**

Morgan National Corporation

*"Renewed understanding of the benefits of client segmentation. Very clear message, and easy to listen to."*

**Sandi Smith**

The Co-operators

*"Great, engaging speech. Great marketing ideas to implement."*

**Gabor Lupkovics**

Desjardins

*"I have been working on being positive and really living it. You have given me reasons on why it may not work and how to change it. You have helped me understand how I can live with a positive attitude and really know how to do it better and believe in it. I have been looking for an understandable and believable concept for a long time. Thank you."*

**Georgina Flexman**

Family Wealth Advisors

*"Great discuss about how we can be and create our own biggest hurdles. Confirmation that many other advisors share the same problems that I am facing in my business."*

**Frank Vanden Broek**

Sunlife

*"Provided provocative ideas to engage a discussion with clients. Great positive energy to pass onto clients."*

**Clifford Dupuis**

Dupuis Financial Inc.

*"I love the enthusiasm of Simon – he gets right to the point. Thanks for the gift of confidence from your presentation, and the realization of the big picture."*

**Bill Munn**

MAP Insurance Inc.

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### Canada Life Western National Accounts Conference - Bear Mountain, Victoria, BC - June 19, 2008

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*"Hit me when I really needed it. Some great ideas, and help with my stinking thinking. Great understanding into my unmet needs vs. my values and how it reflects in my business."*

**Gene Eberley**  
TD Waterhouse

*"I cannot verbalize the feeling but I was left with an unbelievable need to act. Simon gets ME without knowing me."*

**Chris Canavan**  
BMO Nesbitt Burns

*"Tangible tools for me and my business."*

**Jed Brezer**  
BMO Nesbitt Burns

*"Great energy. Interesting concept of removing roadblocks before planning. Thought provoking and great material."*

**Doug Salberg**  
Raymond James Ltd.

*"I enjoyed the passion you bring to your presentation. Content is fabulous. Positive ideas that appear practical and achievable."*

**Eric Schenstead**  
CIBC Wood Gundy

*"The energy and encouragement to re-evaluate my business and my daily life. Motivation - even though I first saw this presentation only eight months ago, this time it moved me immensely."*

**Colin Biblow**  
Credential Financial Strategies

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### Pro Seminars - Calgary, AB - June 17, 2008

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*"Fire Start! Positive kick to the day, a great wakeup call Simon!"*

**Mark Kotris**

VIP Moneywise

*"I really enjoyed your material on how to get used to change, the importance of having a vision and commitment and how to provide great value to my clients."*

**Irvin Wilibnisky**

Great West Life

*"Really liked your get serious approach about vision, marketing plan, and the discussion on the Top 40 concept."*

**Bill Janzen**

Investors Group

*"Refreshing to again hear that we move ahead with positive thinking, and the need to focus."*

**Thomas Miller**

Sun Life

*"Detailed, informative and flowed well together. Information is understandable and useable."*

**Mark Leeb**

Leeb Sherwin Financial Services

*"Energetic & factual & to the point. Great marketing ideas."*

**Sid Giroux**

Giroux Financial

*"Great information to share with my agents regarding their attitude to recession and how to reach above it, to help their clients and show them a new vision."*

**Jennifer Simpson**

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## Audience Testimonials

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### IFB - Toronto, ON - May 27th & 28th, 2008

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*"We were able to get so much more out of his presentation because he took the time to engage the audience. He understands our needs. Good Job! I now understand how human psychology has an impact on the financial services professional."*

**Eldean Dickenson**

Wheatfield Financial Group

*"You have inspired me to get back to basics after 20 years in the business. The passion in which you operate and it rubbed off on me. Even though I am "busy" with an assistant I feel like I am "retired"."*

**Sandy Theys**

Theys Insurance Ltd.

*"Refreshing! It truly brought everything back into focus. A reminder on goal planning more often and how to schedule the time. I really enjoyed the ideas of how to provide little extras for clients – concierge service – favorite wine, magazines, etc. Wonderful ideas!"*

**Debby Austin**

ETFS

*"Your passion and conviction for what you stand up to fight to make our profession better, is outstanding. I really enjoyed your material on the complete list of building a foundation for your business."*

**Kevin Cahill**

Kevin Cahill Financial Services Inc.

*"Your presentation was the best of the entire Toronto Spring Summit."*

**Rachel Valliere**

Taylor Financial

*"It awakened the driving forces that have kept me in this industry for almost 30 years. We have all the tools we need including an excellent infrastructure and support team."*

**Simon G. Hecks**

Charter House Financial Group

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## Audience Testimonials

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*"I have the knowledge and desire, I lack the vision and need to understand my values and set my goals. Simon reminds you that you're in control, you need a vision and set goal to achieve it."*

**Jim Brough**

Edward Jones

*"Insightful and very current information. Simon is a very engaging speaker with great examples. He held my attention the whole time."*

**Michael Brattman**

Cowan Insurance Brokers

*"Your dynamic presentation emphasized your abundant information and quotes. I didn't expect the spiritual content of your presentation – thank you."*

**Keith Sutherland**

Totally Diversified Financial Services

*"Inspiring. Setting values. Reinforcement of my abilities and the things I am doing right."*

**Muneer Habib**

Aimm Inc.

*"Made me get a positive outlook about the future of the financial services business. You have always been excellent every time I see you, so there was no reason for me to not expect the best."*

**Nelson D'Silva**

Advent Financial

*"Simon, you are very motivating. You present information in a useful setting. Great energy; and I understand the need for a coach to help me grow my business."*

**Diane Chetram**

Great Wealth Insurance & Financial Services

*"Dynamic presentation. Best pep-talk I've heard since companies did away with agency offices."*

**Edward J. Uhraney**

Uhraney Insurance

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