



LEADING
ADVISOR
CLEAR YOUR ROADBLOCKS



Event Planner Testimonials

"Simon Reilly's Curing The Unmet Needs Disease – How To Thrive In Business By Meeting Your Unmet Needs presentation was an incredible kick off for our Advocis Chapter for 2009. The best thing about the presentation was his pre-presentation interview process. Simon interviewed us in advance to understand the unique concerns, demographics and issues that are going on in our area. He customized his presentation to suit our region instead of delivering a canned presentation about what might be going in some far away metropolis. Members of the audience were engaged because he really addressed our issues and concerns on a Chapter level. We all appreciated this as we were given solutions that we can use in our practice right now. What surprised us the most was the enthusiasm and passion that he brought to the presentation. We will definitely have Simon back to speak in 2010!"

Chad Buell

Advocis Bay of Quinte Program Chair (2009)
Freedom 55 Financial
Belleville, ON

"I listen and react to passion and Simon is certainly not in it for the money. Countless people came up to me after the presentation to comment on his commitment, energy and how his passion flows right through to the audience. He presented his information in such an organized way, clear, concise, and engaging. Our expectations of Simon's presentation were definitely met!!"

Angela Houle

Advocis Ottawa Program Committee (2008)
McAuley Financial Services
Ottawa, ON

"Simon's Clear Your Roadblocks Speaking Presentation was blunt, upfront, honest and he told the real truth. He shared insights to help financial advisors understand the roadblocks and take action towards creating new business rather than resting on their service commissions and trailer fees. Some say that my position as the Advocis Ottawa 2009 Program Chair will be a challenging one. Simon's presentation helped me to understand how to be more proactive and inspired me to take action now to get 25% of the 2009 Program Chair work done in 2008."

John Saikaley

Advocis Ottawa Program Chair (2009)
Dolphin Financial
Nepean, ON



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"Simon is a freebie marketing genius. His presentation is loaded with content."

Kate McCaffery

kate.mccaffery @ advisor.rogers.com
Practice Management Editor
Advisor.ca
Toronto, ON

"Good, clear, and lively."

Al Emid

al.emid @ insurance-journal.ca
Senior Journalist, Toronto Bureau
The Insurance Journal
Toronto, ON

"Simon clearly has a lot of enthusiasm and passion for what he does and he shares this through his presentation style. His Removing Your Roadblocks Presentation is loaded with a lot of information on increasing your business and whets your appetite for more. Simon's presentation was part of our Spring 2008 Campaign Kick Off and one of our financial advisors commented, 'it was the best campaign kick off that we have ever had'".

Graham Calder

graham.calder @ freedom55financial.com
Director, Business Development
London Life/Freedom 55
Nanaimo, BC

"The Removing Your Roadblocks To Success Presentation invited the audience to look at the key areas of their business causing them to do a self evaluation on their own practice and understand the roadblocks that stop them from going to the next level. Simon brought forward and instilled a level of excitement and enthusiasm about financial services which our industry may have gotten away from through the education process which can sometimes get too heavily into the technical side on products. His presentation was refreshing and was a great way to end our Educational Event."

Neil Kellock

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Regional Marketing Consultant
Ontario Regional Marketing Centre
Canada Life
Toronto, Ontario

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"Removing Your Roadblocks drew the largest crowd and was the most engaging lunch and learn presented by the Calgary chapter so far in 2008. We didn't receive one negative comment. Simon brought enthusiasm to the presentation right from the get go, causing the audience to immediately look up from their lunch because there was something that was really going on.

The presentation addressed how to leverage the advisor's time and challenged the audience to determine whether they were busy doing \$20 & \$25 per hour work. This really resonated with people and caused them to ask themselves whether they were choosing to really invest in their business or just sit and be frustrated with the paperwork. We can all be busy just being busy. But Simon spoke about the need for prioritization, being leaders and making a positive impact on both our clientele and staff. The presentation also addressed succession planning for the financial advisor. The reality is that it doesn't make sense for financial advisors to talk to their clients and prospects about succession planning and then not practice what they preach.

Simon really caused the audience to look at the emotional side of their business and to understand that in times of change the best get better and the worst disappear."

Jeff Dyck

jdyck @ ppi.ca
Advocis Calgary Program Chair (2008)
PPI Financial Group
Calgary, AB

"I consult with advisors across Canada. Your content hits the nail right between the eyes! There is someone out there that really gets it."

Michael Tourond

Best Practices Chair, Advocis Greater Hamilton Chapter
Director Of Communications, GAMA Canada
Tourond Financial
mike @ tourondfinancial.com

"Sincerity, humor, enthusiasm – genuine concern about the succession problems of ageing financial advisors. He is much more computer savvy than expected with lots of credible research to back up his points. Simon distinguished himself from being a motivational speaker. Simon's presentation is all solid practice management material and ranks right up there with comparable speakers like Wayne Cotton."

Terry J. McBride, B.Comm., CLU, CFP

Tax and Estate Planner
President, Advocis North Central Saskatchewan (2007)
Raymond James Ltd.
Saskatoon, SK
terry.mcbride @ raymondjames.ca

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"Simon's Removing Your Roadblocks To Success Presentation was far better than I expected. Simon's energy along with the presentation captivated the audience and many were furiously taking notes. We all felt that we needed to hear more."

Laurianne Osmak, CLU

losmak @ sasktel.com

Programs and PD Days Chair, Advocis, Central Saskatchewan (2007)

Insurance & Investment Specialist

Rudichuk Agencies Ltd.

Wakaw, SK S0K 4P0

"Removing Your Roadblocks To Success is a different approach emphasizing that you really have to have a strong foundation for your vision and business plan to stand on. I was anticipating rah, rah motivation and we received a much more serious approach.

It's easy to spout off ... Simon really understands what we are going through and I would have been happy to listen to Simon for hours as his information really hit home causing us to be at full attention, not letting our minds wander off. Simon delivers his presentation with enthusiasm and his presentation is logical, thoughtful and well laid out. His approach is empathetic and hits home on the issues we are facing in our industry providing a step by step understanding to helping to eliminate the roadblocks that we are facing."

Rick Kelly

Branch Manager, Investment Planning Counsel

President Advocis North Western Ontario (2007)

Thunder Bay, ON

rick @ ipcamethst.com

"I want to thank you once again for presenting to our group. Your presentation was well received with good comments coming out of it and some stating they were going to do some of the follow up work you had suggested - I being one of them."

Thanks again Simon!

Elden D. Morais, CLU, Ch.F.C., CFP

elden.morais @ cumis.com

National Manager, Individual Life

Sales and Marketing

The CUMIS Group

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"Excellent presentation that gave me a better understanding of how my values and behaviors relate to the importance of understanding and developing an all encompassing self plan, life plan and business plan".

Brett Langill, BA, CFP

Brett @ BrettLangill.com
Certified Financial Planner
Brownstone Investment Planning Inc.
Toronto, ON

Thanks to you for taking time out of your busy seminar schedule to deliver your presentation in Regina. I really enjoyed your presentation, as I felt that you delivered material that was applicable to both new agents and seasoned agents. As for me personally, I liked that you spoke about the steps to building a foundation for your business. In addition, I enjoyed hearing your personal stories, as I try to use personal stories during my presentations to the Reps that I work with in the field. As for what I received that I did not expect, was how much information that you have gathered and the scientific research that you have done on the financial services industry. Best wishes for your continued success!
Regards,

Jeffrey M. Locke, BA, MBA, CFP, CLU, RHU

jeff.locke @ cumis.com
Programs and PD Days Chair, Advocis, S. Sask. (2007)
Life Marketing Specialist (Saskatchewan, Manitoba and Alberta)
The CUMIS Group Limited
Regina, SK

Thanks again for coming out to speak at our event, and for the brief conversation that we had following your presentation.

What I liked about the presentation was the amount of energy and passion you displayed. As per our conversation, I felt it really hit the nail on the head with the "road blocks" I and others encounter. A lot made sense after I heard your whole presentation.

I was very impressed with the presentation.

Thanks, and look forward to speaking with you soon.

Steven Bakouris

Steven.Bakouris @ Freedom55Financial.com
Programs and PD Days Chair, Advocis, S. Sask. (2007)
Financial Security Advisor
Freedom 55 Financial
Regina, Saskatchewan

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Your passion and enthusiasm just shines through. I particularly like the way you present "Being" an Advisor versus "Doing" Sales. You speak enthusiastically and passionately about what you believe in. This translates to the audience and they get inspired by the energy of your presence along with the valuable insights that you have to offer.

Nicole (Nicky) Sung - CFP, CLU, CH.F.C

nsung @ fmbrokerage.com

President

Financial Management (BC) Inc

Simon Reilly embraced and engaged our Advocis Education Day right from the start by taking the time to interview us in advance of our event to enable him to groom and mould his "Removing Your Roadblocks" Presentation to address the needs of our geographic area and audience. Simon is a dynamic and engaging speaker and kept our audience captivated and engaged providing an excellent and informative presentations that was presented in terms that were simple and easy to understand, providing insight about the issues and opportunities that are going on in our industry. We received excellent feedback from our attendees and we would welcome the opportunity for him to speak again.

David Janzen

premier @ westman.wave.ca

Financial Advisor, Premier Financial

Program Chair, Advocis, Westman (2006)

Brandon, MB

Removing Your Roadblocks was very well received and intrigued Financial Advisors to step out of the box and examine their practice in a completely different way. For me, Simon's presentation caused me to really think and evaluate how my personally can influence and drive both my relationship to my practice and my relationship to my clients. The Leading Advisor web site provides ongoing support for continued advisor and practice development.

Robert McGuire

robert @ mcguirefinancialservices.ca

President, McGuire Financial Services

Vice President, Advocis New Brunswick (2006)

Saint John, NB

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Simon's speaking presentation, "Removing Your Mental Roadblocks To High Productivity", causes you to critically reflect on yourself and your practice to determine if you are really achieving what you want out of your business. It forces the question, 'Are you honestly looking at building a business with a vision, or just making a living?'

Doug Knight

doug @ equinoxkelowna.com
Knight Financial
President, Advocis North Okanagan(2006)
Kelowna, BC

Simon's presentation was excellent and he knew his audience, hit the important issues, was able to challenge us & blend it all with humor & love for the human spirit.

Ian Fordyce

IPC Investment Corp.
Williams Lake, BC

Simon is clearly one of our most passionate and inspiring speakers. We are pleased to be able to provide our audiences with Simon's unique and scientific approach that shows financial advisors how to lay the foundation for a practice based on advising vs. selling, wealth management and referrals. By the end of 2006, Simon will have completed over 25 speaking presentations for Pro-Seminars right across Canada to hundreds and hundreds of financial advisors to nothing short of rave reviews.

Alex Nicholson

alex @ pro-seminars.com
Vice-President
Pro-Seminars
Beamsville, ON

Simon's years of experience in professional and business development really comes across, his professional speaking style is very inspirational and one really comes away with ideas and tools that they can implement into their business right away.

Frank C. Allen - CFP, CLU, C.H.F.C

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The Frank Allen Financial Group Inc.
Past President Greater Nanaimo Chamber of Commerce
Past President of The Rotary of North Nanaimo
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