



**LEADING
ADVISOR**
PLAN · PRACTICE · PROFIT



Simon Reilly - Professional Speaker

Simon Reilly is an expert business coach, speaker, writer, and values and behaviors analyst.

For more than 15 years, Simon has worked exclusively with successful financial advisors and their teams to achieve sustainable business results.

Over the past 6 years, Simon has spoken to over 20,000 advisors across Canada & the USA at nearly 200 financial advisor conferences that include NAIFA (National Association of Insurance and Financial Advisors) 2011 National Conference in Washington, DC, the Million Dollar Round Table 2010 Annual Meeting in Vancouver, BC, main stage at Great West Life, Hub Financial, London Life, PPI Solutions & Sun Life Conferences, 20 Advocis Chapters coast to coast and his presentations have been approved for CE Accreditation under the new 2010 Advocis / CLU guidelines.

Simon was nominated as one of the Number 2 Finalist in Advisor.ca's 2010 Name That Visionary Contest and has written for Advisor.ca, was profiled in The Insurance Journal and has been published in FORUM magazine. He is the author of "Curing The Unmet Needs Disease" – a book and workbook that provides the missing link to; breaking through the plateauing out syndrome and building a bigger vision & business plan.

He is a member of Advocis (The Financial Advisors Association of Canada) and the IFB (The Independent Financial Brokers of Canada) and NAIFA (National Association of Insurance & Financial Advisors).

Simon continues to lead the way as a Senior Certified One Page Business Plan Consultant.

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Financial Advisor Speaking Topics

One Page Business Plan - You Don't Need More Time...You Just Need to Decide!

- Do you have too many scattered ideas?
- Do you need to focus on a few?
- Do you need to jumpstart your business right now?
- Do you have no time or interest in writing a 50 page business plan?
- Do you need to determine if you're focusing on the right things?
- Do you need an effective blueprint to keep yourself and team focused?

Join Simon Reilly in this value packed presentation to learn how the One Page Business Plan can help you to write a clear, concise, and understandable business plan using key words and short phrases in the fastest, easiest and simplest way possible.

Breakthrough! – How To Breakthrough “The Plateauing Out Syndrome”!

- Have you managed to maintain the same levels of production through recent events?
- Are you struggling to figure out how to "grow" your business in real terms?

“The Plateauing Out Syndrome” was coined by the members of The Million Dollar Round Table. With the advent of “The New Normal” contributing to clients taking longer and longer to make decisions, Breaking Through “The Plateau” seems more daunting than ever. For some, the pace of business isn't what it used to be contributing to thoughts like, “is this all there is?”, and “what am I doing this for?”, and “what is the use?”

“When there is understanding, there is no judgment. When there is judgment, there can be no understanding or inspiration”.

Join Simon Reilly to understand How To Breakthrough “The Plateauing Out Syndrome”.



*Simon Reilly named as
finalist in Advisor.ca's 2010
Name That Visionary Contest*

Financial Advisor Speaking Topics

Clear Your Roadblocks

CE Accredited under the 2010 Advocis / CLU Institute CE Accreditation Guidelines

A recent survey suggests that 49.1% of Financial Advisors are not very satisfied and 40% of Financial Advisors are unsatisfied. If we are supposedly living in a world where "money buys you happiness," and therefore working in the financial industry should make you really happy, one has to ask, "WHY are we so unsatisfied?" This presentation will help you to understand WHY you may have the Roadblocks and HOW to Clear Your Roadblocks to YOUR Income. As well, you'll learn crucial information about Vision and Business Planning, Time Management, Delegation, Referrals, High Net Worth Clients, Product Specialization, Niche Marketing, Client Segmentation and More.

Clear Your Roadblocks To Practice Management

Now that you understand your roadblocks and how to clear them, join Simon for a review of tried and true and for some new ideas to implement vision, business plan, goals as well as financial controls, time management, team, delegation, back office systems, marketing plan, knowing your client, client segmentation, customer service and asking for referrals.

Magnify Your Practice Management With Attention Management

- There's nothing new out there - except the internet
- All the old ideas about time management and personal effectiveness
- All the old ideas about business dev, marketing and selling....
- Are Still Great Ideas!!

But how do you adapt them to the 21st Century, real-time news and information, instant global communication, and the rise of "FREE"?

In this session, Simon will help you to re-learn the good old basics like Time Management that was fathered by Alec MacKenzie's "The Time Trap", 30 years ago before technology was invented. Since then, the landscape of Time Management has changed with the advent of the Blackberry, iPhone, Mac and PC. Join Simon Reilly to learn How To Use Old Ideas In "The New Normal" and Breakthrough "The Time Trap".

Clear Your Roadblocks To The Client Engagement Process

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In this ever changing world that advisors and clients are facing alike, what do advisors need to do to serve with integrity and thrive while being a Master Practitioner that puts the client's needs first?

Simon will offer the wisdom that process driven Master Practitioners are using to question, gather information, understand and engage their clients' financial planning needs at a values based level to offer customized solutions to meet and exceed their clients' concerns, expectations and objectives.

