

THREE-DAY PRACTICE FOCUS WORKSHOP

Unique
experience in the
lovely UNESCO
community on the
shore of Nova
Scotia



THE IMPORTANCE OF A LEAN, PROCESS-DRIVEN PRACTICE THAT IS FUTURE-PROOFED

A practice is only as successful as the model upon which it is based...

Complicated businesses will not meet the needs of their clients and will fail to attract prospects. Lean businesses have the ability to adapt to any situation quickly.

Goal-driven practices are hindered by the boundaries that limit its future. Process-driven practices are able to grow in good and bad markets.

Great practice may be blind-sided because it is focused too much on current activities. Future-proofed practice are prepared for the uncertainties of the future and is sellable.

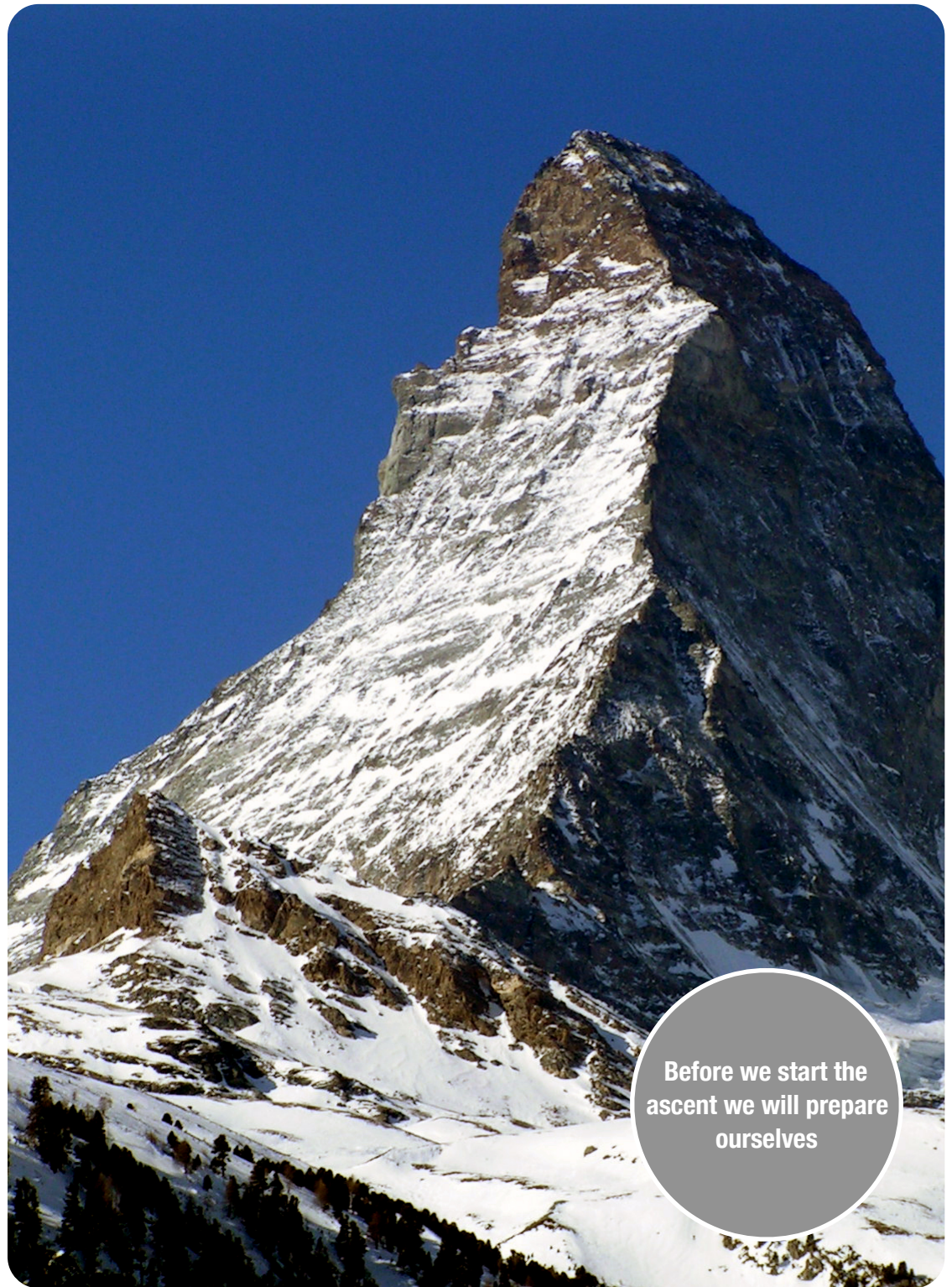
The business model you use to create your practice will impact your ability to serve the needs of clients, create the outcomes you desire, and secure your future.



Your Business Model is a Map
A practice will only add value if the model it is based upon is lean.

Workshop

W O R K S H O P P R E P A R E D F O R A S C E N T



Before we start the ascent we will prepare ourselves

BEFORE

Before you arrive we will have a conference call to prepare for our time together and customize the days to best meet your specific needs.

DURING

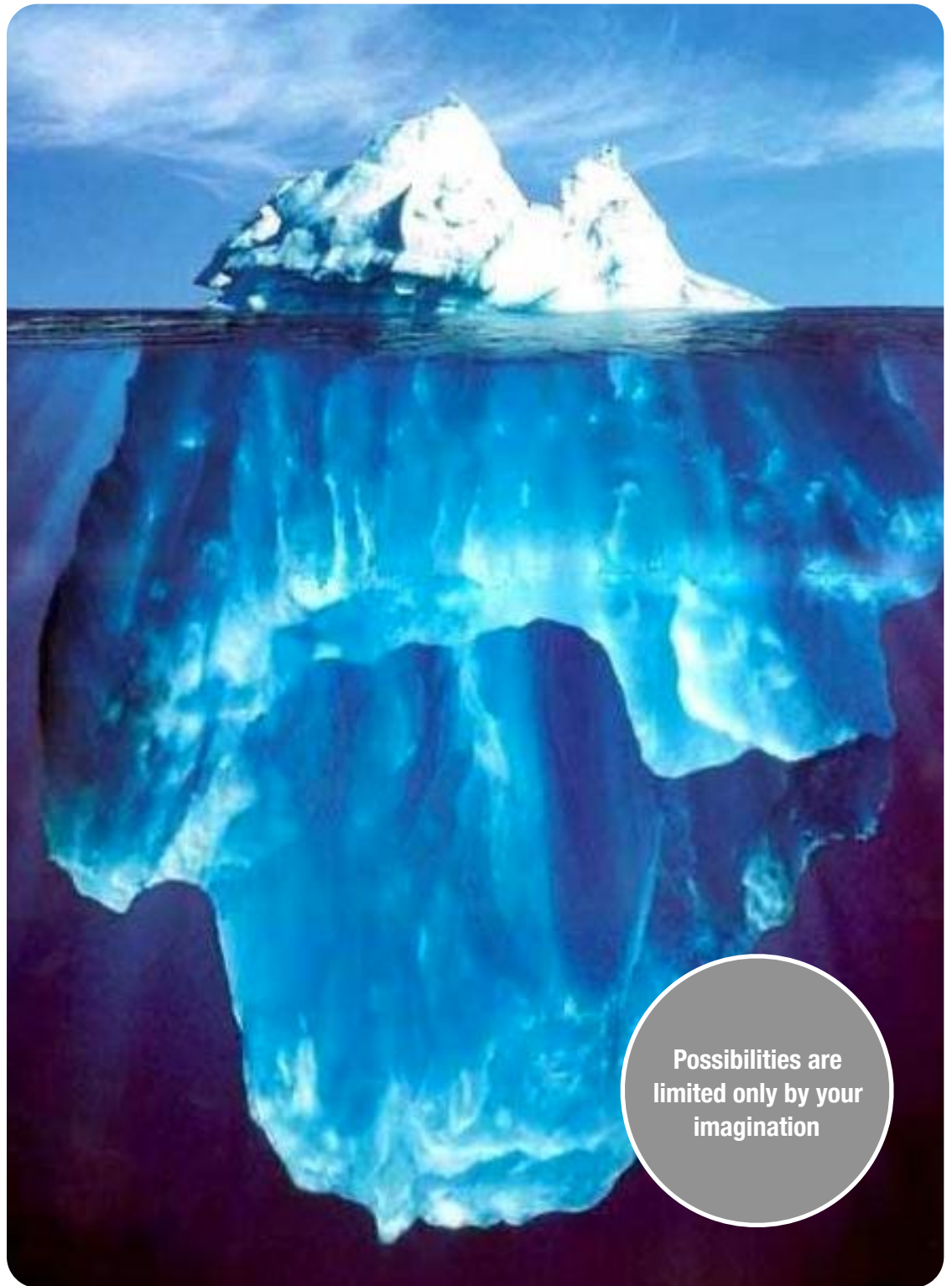
During the workshop we will address your current project list, discuss the best tools and methods to build efficient systems, and assess your practice.

AFTER

After the workshop we will have another conference call to help you implement your action plan.

Workshop

3 DAY ONLINE



Possibilities are limited only by your imagination

BELIEFS

We will analyze the beliefs you and your clients hold that place your business and future at risk and how to change them to empower your practice.

HABITS

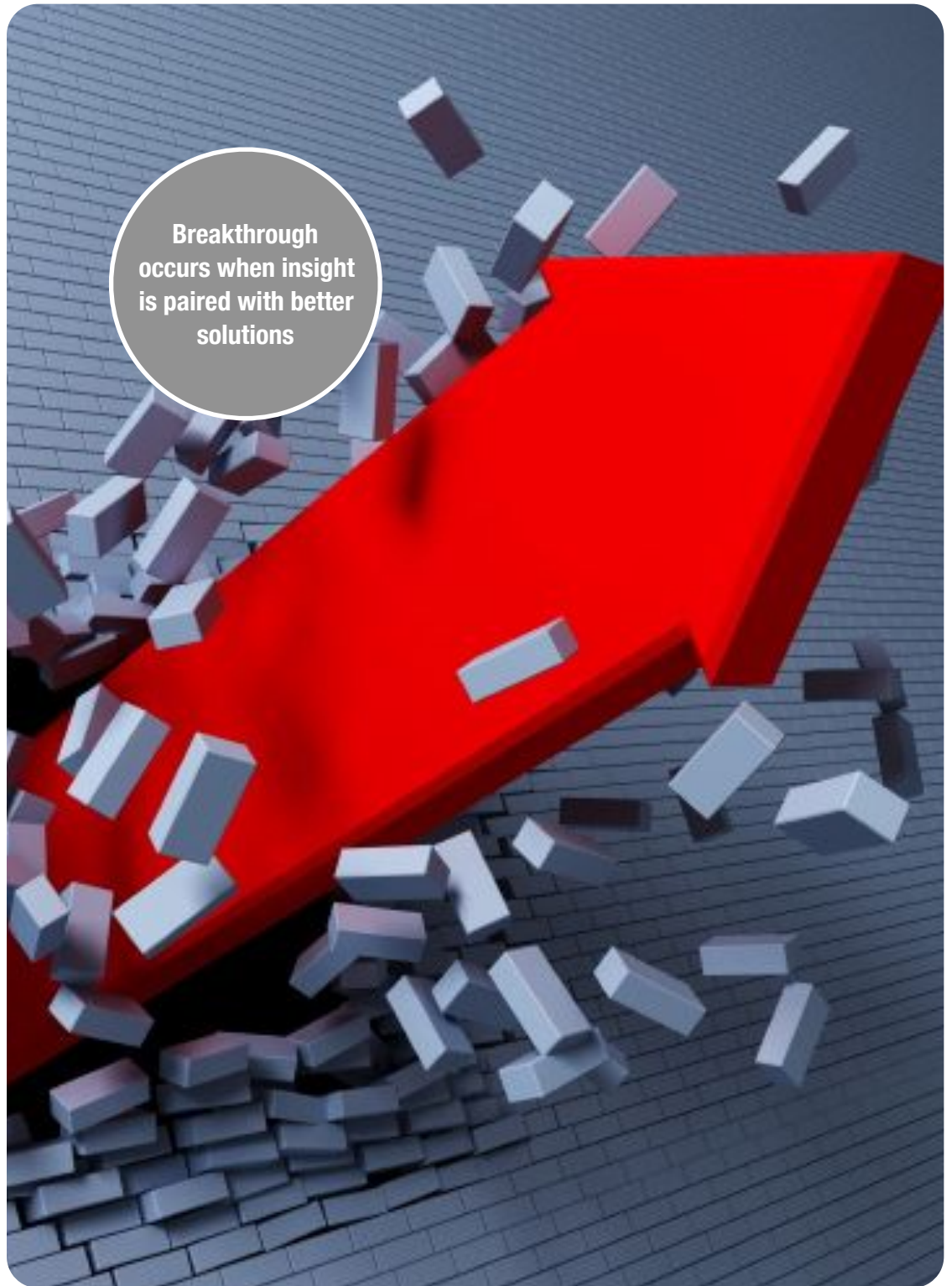
We will focus on specific habits that create simple routines for your team to execute that will increase productivity.

LEAN BUSINESS

We will apply the tools of the best practices that will streamline your business for better time management, improved client contact, and more free time.

Workshop

OWN - LAW - DAY - LAW - DAY



Breakthrough
occurs when insight
is paired with better
solutions

BETTER ANALYSIS

Imagine if the myriad of interruptions that enter your life each day were quickly handled and you were able to focus all your time on what is most important.

BETTER SYSTEMS

Build simple systems that exceed your clients' expectations, improve your team's productivity, and create proactive time.

BETTER TOOLS

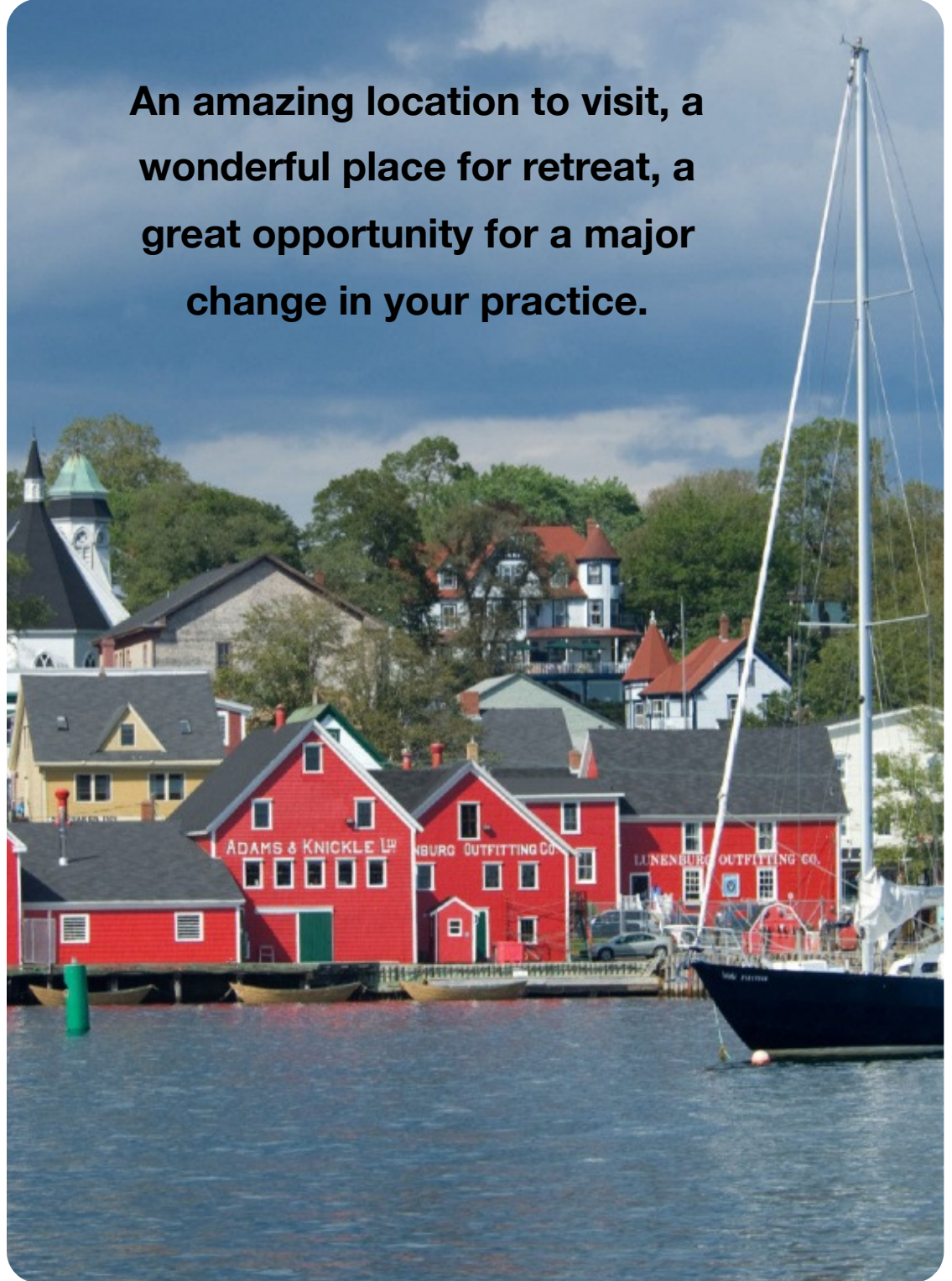
Find the resources you are missing to design the business you desire, and make your practice more attractive when you are ready to retire.

Workshop



A UNESCO World Heritage Site that offers much to see and do.

An amazing location to visit, a wonderful place for retreat, a great opportunity for a major change in your practice.



HISTORIC BUILDINGS



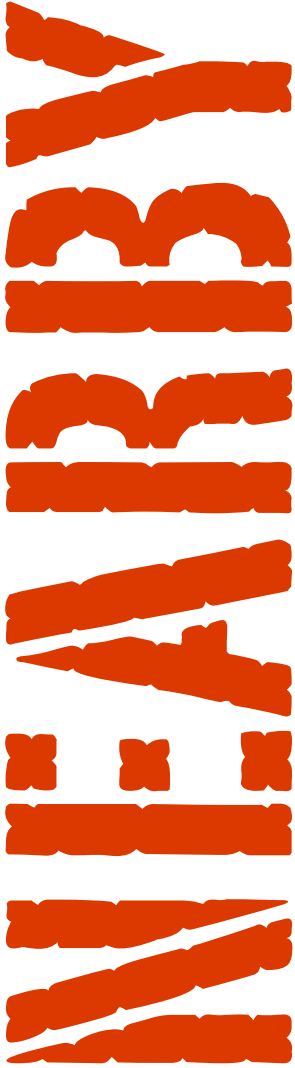
BLUENOSE SCHOONER



UNIQUE HARBOUR



Workshop



From the heights of Cape Breton to the cliffs of Peggy's Cove, Nova Scotia is Canada's Ocean Playground.

Bring your family, extend your trip, and relax among the beauty of Nova Scotia.

CAPE BRETON



PEGGY'S COVE



HALIFAX



W. LLOYD WILLIAMS

Author, Executive Coach, Speaker

Lloyd Williams is the author of *Attract Clients: A Financial Advisor's Guide to Building and Running a Practice*. He is an international speaker, executive coach, and the creator of the Exponential Business Model™ and the Relationship Conversation™. Lloyd has conducted workshops for advisors of more than fifty top financial service firms. He coaches a select group of executives and entrepreneurs. His coaching guides them toward positive, exponential results in both their personal and professional lives. Lloyd divides his time between Canada and the United States.

WORKSHOP ENDORSEMENTS

"More value added than the 27 years in the business"

"Revolutionary, if offered the chance, do not hesitate"

"Experience was extremely informative and will give our team a better edge"

"Great experience."

"Career changing"

"Very enlightening on how we can better manage our clients portfolios"

"Huge opportunity to add value"

"Excellent opportunity to learn more about what is really happening in the markets"

"Eye-opening. Expanded my outlook for our business."

"This program will be transformative to our business going forward."

"A tremendous resource."

"Invigorating and encouraging for what might happen."

"A life changing tool"

"Laid out a framework in which we could create a process"

"Excellent information, eye-opening."

"Gave us the edge we have been looking for and showed us how to execute and communicate it."

"Never seen before information."

"Feel empowered by the knowledge we received and the new tools"

"A pleasant surprise"

"A valuable workshop for anyone interested in improving their client's performance on a regular basis."

"Extremely enlightening, brought ideas and critical things to mind that I never would have seen on my own."

"I now have a better ability to analyze the market conditions."

"Eye-opening. I don't know what I don't know. Very different approach to managing money."

"It's like drinking out of a fire hose."

"Added an edge to our practice."

"Very good, wasn't sure what to expect, excited about the future of my team."

"This experience has been enlightening and empowering."

"We have an advantage over our competitors now."

"Opened a door to increase success."



"I now have an understanding of how to navigate the markets with confidence."

"What I have been looking for, what clients want and need."

"I now have a rules based systematic approach to take advantage of the new market environment."

"Eye-opening days of information that is needed to improve our investment process and achieve improved results for our clients."

"Time well spent."

"Very educational. Gives you a wider outlook on what you can and cannot control."

"A great few days."

"Eye-opening experience and very worthwhile investment."

REGISTER NOW!

EXPERIENCE

"Lloyd Williams brings with him not only a wealth of experience but very unique insight into the ways in which advisors and their clients think."

- Don Howden - Branch Manager - Raymond James

EXPERIENCE

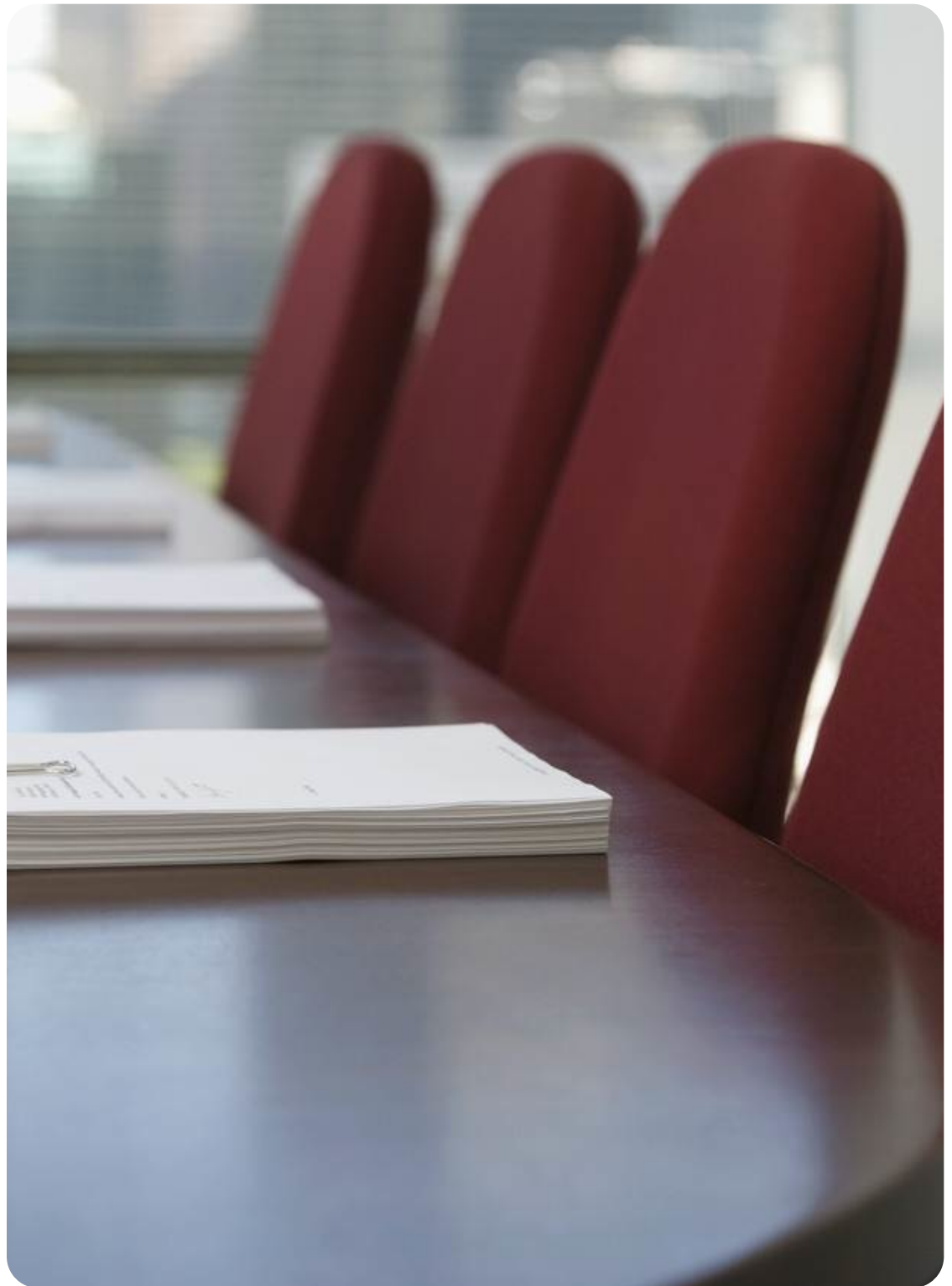
"The most productive, visionary, real world, no-nonsense, results-getting program for a financial pro I've attended in my fifteen years in the business." - Mel Johnson

DELIVERABLES

Lloyd does not solely focus on great concepts, but brings tangible tools and solutions that can be implemented immediately. Theory without application is just a nice slogan.

Workshop

WORLDWIDE CONFERENCE SERIES REGISTRATION



DATE & TIME

Thu, Oct 5, 2017 -
8am-5pm

Fri, Oct 6, 2017 -
8am-5pm

Sat, Oct 7, 2017 -
8am-5pm

LOCATION

Lunenburg Arms Hotel
94 Pelhan Street
Lunenburg, NS B0J 2C0

NOTE

If you have questions
please email
wlw3@mac.com to
schedule a call.

COST

\$4995.00 CAD per team
conference fee.

Includes: 3-day
workshop for 2 team
members of the same
team. Food and
accommodations not
included.

REGISTRATION FORM

Name: _____

Firm: _____

Email: _____

Work Phone: _____

Cell Phone: _____

Website: _____

Visa or MasterCard only

Credit Card #: _____

Name on card: _____

Exp Date / Sec # (on back): _____ / _____

Billing Address: _____

Postal Code: _____

Signature: _____

Your credit card will be charged \$4995.00 CAD (plus HST if Canadian) to reserve your two (2) seats at the **Three-Day Practice Focus Workshop** conducted by Lloyd Williams in Lunenburg, NS on October 5-7, 2017.

This fee covers prep call, materials and assessments prior to and during the workshop, and post-workshop call.

Each team must make their own accommodation and meal arrangements. A list of recommended hotels, B&B's, and restaurants will be provided.

This payment is non-refundable and if you are unable to attend for medical reasons your payment will be applied to the next workshop series.

Registration is limited

Please send this page by fax or email to 309-294-5519 or wlw3@mac.com