

RJW | Financial Planner Speakers Program

The purpose of our Financial Planner Speakers program is to place qualified financial planners / wealth advisors into our portfolio of conference-style events to targeted audiences in our markets.

You as a speaker can choose which of these events to participate in that fit the type of clients that you are targeting. Each speaking engagement is for 25-30 minutes.

Your package for each event includes:

- * Speaker slot
- * An exhibitor table
- * Contact information of attendees for your own follow-up
- * Meals for you and two associates
- * Your business description and direct contact information on event promotions to prospective attendees

You can choose from these types of conferences and events:

*** Physician Dinner Speaker Series**

This is a private dinner for about 80 doctors held in a social setting. You will be one of four presenters on topical subjects for physicians.

*** Financial Planning and Retirement Strategies for Affluent Individuals**

Our target is affluent individuals with a net worth above one million and / or a home value of at least \$600,000 or more. Other speakers include a CPA, private banker, real estate specialists and elder law attorney.

*** Senior Education Day & Expo**

This event attracts about 200 seniors. Our target audience is affluent seniors aged 65-78 years of age. There are 25 exhibitors who provide services and products to this senior market. You will be among five speakers but the only financial planner participating in the event.

*** Financial Planning and Retirement Strategies for Dental Professionals**

This conference is for dental professionals (usually between 60-80 in attendance) and features speakers on subjects such as

- * Navigating a financial future
- * Safe returns on investments
- * Minimizing taxes

- * How to plan for a retirement
- * What to do with excess funds during this inflation driven financial climate
- * What should I do about real estate and / or a second home investment
- * How can assets be protected
- * What retirement planning changes should I make
- * Financial strategies for major life transitions such as divorce from or death of a spouse
- * Is there a consistent manner to use my income and assets to build real wealth in a reasonable period of time
- * How can I maximize the amount of my estate that can be passed on?
- * What is cryptocurrency and should I get involved in investing and how?

You can choose one of these or another subject you are most comfortable speaking about that lies within your expertise. It is ok if there is some overlap as we have found that the audiences enjoy different points of view.

*** Conference for Children of Aging Parents**

Our target audience for this conference is affluent middle-aged individuals (ages range of 45-64) who have an elderly parent. As the financial planner speaker, you have two prospects – (1) services that you can provide the elderly parents and (2) the services can offer the middle-aged affluent attendees.

*** Financial Planning Strategies for High-Income Business Owners**

Our target audience is a business owner with substantial income and/or large size operation. Our topics include financial planning as it is specific to self-employed individuals for retirement strategies, tax reduction, business exit and other subjects that are relevant to high-income generating people and specific to a business owner.

*** Conference for Professional Women – Financial and Wealth Building Strategies**

This conference targets women in professional careers with income above \$150,000 per year. The subjects and format of this conference is similar to the conference for dental professionals that is outlined above.

*** Business Expo**

This is a general business expo that is marketed to about 10,000 business owners and features businesses and professionals who serve the business owner market. Your speaking subject will be related to themes that are relevant to a business owner as to their current needs related to their business and/or related topics on disability protection and retirement planning, etc.

*** Financial Planning, Income Strategies and Asset Protection Conference for Seniors**

Similar to our target audience of affluent seniors for our Senior Education Day & Expo, this event is different in that it is narrowly focused on subjects related only to financial strategies, asset protection, tax liability productions and improvement of passive income.

Additional Part of Your Speakers Package – You can place a half page ad monthly in any of our local monthly digital publications that fit markets that you are targeting in your market as part of your speaker package:

* MD Life

Distributed to the thousand of practicing physicians (about 6,000 in most markets)

* Business Owners Monthly

Distributed to business owners (between 8,000-10,000 depending on the market)

* Affluent Lifestyles

Distributed to homeowners with property values above \$600,000.

* Senior Lifestyles

Distributed to affluent seniors (approx. 8,000 in each market)

* Dental Practice Management

Distributed to dentists, oral surgeons, DMD's (between 800-1,000 depending on the market).

You will be guaranteed a minimum of at least twelve speaking engagements which you agree to participate in during a twelve month period. There is no charge for any additional speaking engagements that we offer you and that you participate in during the first twelve months.

You can join our program with these payment options:

* Monthly - \$399.00 introductory rate for twelve months (regular rate is \$499.00 after 7/01/23)

* Quarterly - \$1099.00

* Semi-Annually - \$1999.00

* Annually - \$3699.00

Please email us at financialplannermedia@creativedevelopmentworks.com or call 888-670-2229 for further information or to become a member in our Speakers Program.