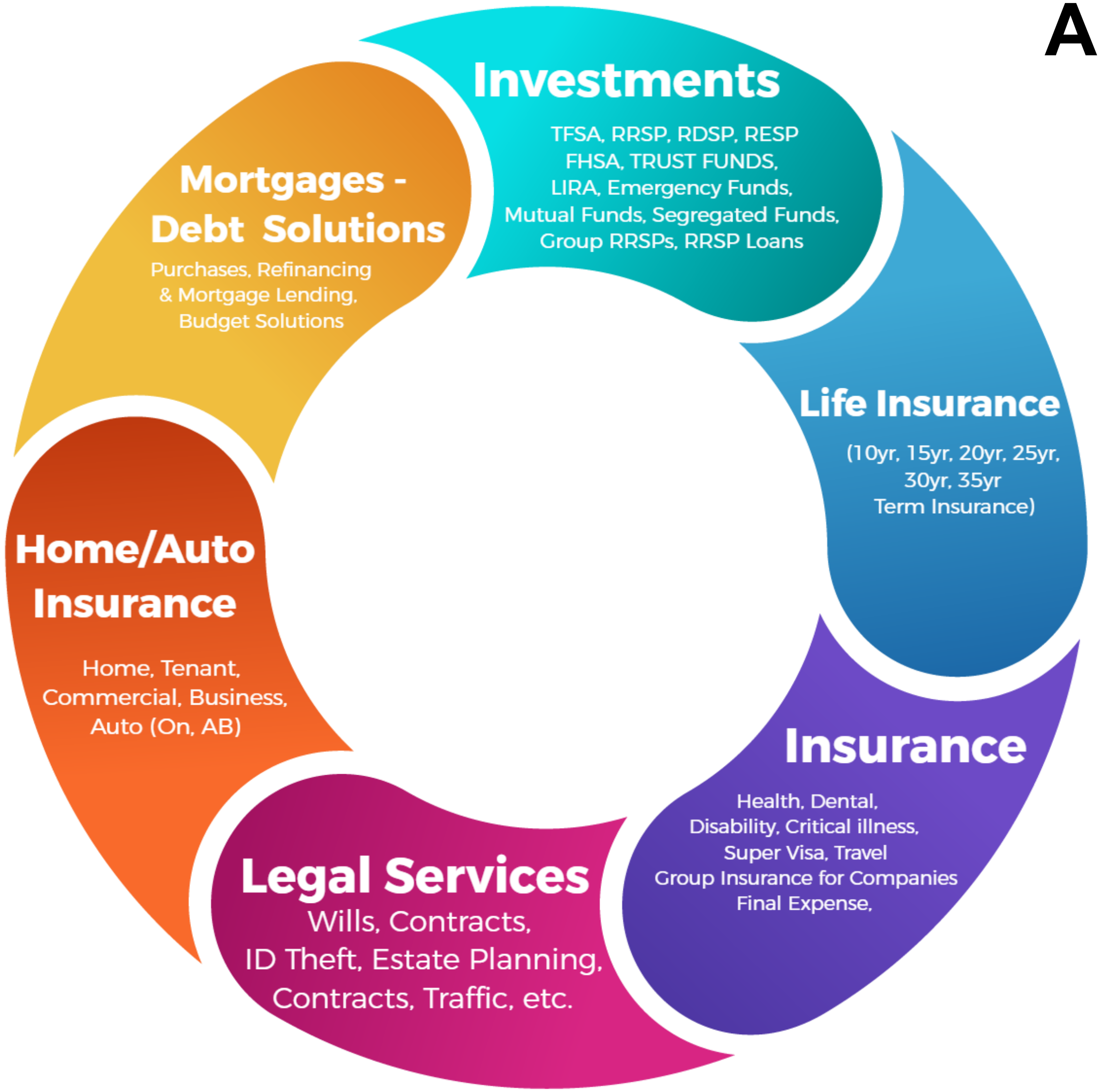

COMPENSATION
INTEREST
ULTIMATUM
DISCUSSION
DECISION
BUSINESS
DISAGREEMENT
WIN-WIN
TACTICS
CONFRONTATION
CHECKLIST
RESOLUTION
PROJECT
PROCESS
OFFER
PROBLEM
QUESTIONER
NEGOTIATION
AGREEMENT
PROPOSAL
SKILLS
SCENARIO
COMMUNICATION
NEGOTIATOR
ALTERNATIVE
DEADLOCK
MEETING

Recruiting to the Investment Industry

- I specialize in helping motivated people build a 6-figure passive income streams.
- I specialize in helping motivated people build a 6-figure passive income producing businesses.

We Have The Solutions



A One-Stop Financial Supermarket…
With Online Home Delivery!

AGF™

MACKENZIE Investments

Canada Protection Plan

Common Sense Funds
An investment program for every phase of life

ROCKET Mortgage

BlackRock

LegalShield

T.RowePrice

IDShield

8Twelve MORTGAGE CORPORATION

Dynamic Funds® Invest with advice.

surex.

the EDGE™ Benefits

Brandywine GLOBAL

the co-operators®

intact INSURANCE

PRIMERICA®

gsc green shield canada

Wawanesa Insurance

PRODUCTS PORTFOLIO

Investments

Segregated Funds

Mutual Funds

RRSPs

TFSAs

RESPs

RDSPs

FHSAs

LIRAs

Emergency Funds

Trust Funds

Group RRSPs

RRSP Loans

Life & Health Insurance

Term Life Insurance – 10yr, 15yr, 20yr, 25yr, 30yr, 35yr

No Medical Life Insurance

Final Expense Insurance

Small Business Insurance

Critical Illness Insurance

Disability Insurance

Dental insurance

Private Health Insurance

AD&D Insurance

Fracture Accident Insurance

Business Overhead Insurance

Travel Insurance

Insurance for Visitors to Canada

Travel Insurance

Trip Cancellation Insurance

Auto & Home Insurance

Home Insurance

Auto Insurance

Debt Solutions

Mortgage Loans

Debt Consolidation

Legal Solutions

Legal Shield

Identity Theft

Not all products/services are available in all provinces and territories.
A representative's ability to market products listed is subject to provincial or territorial licensing and/or certification requirements.

2 Trillion-Dollar Industries

Insurance

Investments

Most People Don’t Plan To Fail, They Fail To Plan

How wise is it to take a road trip without a roadmap or GPS?

A Financial Needs Analysis is a Financial GPS

How many people could benefit from a Financial GPS?

FNA

FNA @ RVP = $1,646

FNA @ RL = $1,168

FNA @ Dist L = $872

RACE TO
100 CLIENTS

100 CLIENTS YR

2 clients per week = $5M Annual

Avg Inv per Account = $24,444

Avg Inv per Client = $57,642

Year	# of Clients	Total AUM @6%
1	100	$5,300,000
2	200	$10,918,000
3	300	$16,873,080
4	400	$23,185,465
5	500	$29,873593

Trails @ RL
$25,629
$52,797
$81,594
$112,119
$144,475

Trails @ RVP
$38,610
$79,536
$122,917
$168,902
$217,646

+ Income From Initial Investments, Life Insurance, Mortgages, And Other Product Sales.

100 CLIENTS YR

2 clients per week = $5M Annual

Avg Inv per Account = $24,444

Avg Inv per Client = $57,642

Year	# of Clients	Total AUM @6%
6	600	$36,979,188
7	700	$44,487,340
8	800	$52,456,580
9	900	$60,903,975
10	1000	$69,858,213

Trails @ RL
$178,773
$215,129
$253,666
$294,515
$337,816

Trails @ RVP
$269,314
$324,082
$382,137
$443,675
$508,905

+ Income From FEL On Investments, Life Insurance, Mortgages, And Other Product Sales.

100 CLIENTS YR

Every advisor in your personal brokerage that develops 100 clients/yr for 5 years generates **$73,170** annual in trails to you.

+ Income From FEL On Investments, Life Insurance, Mortgages, And Other Product Sales.