



Lee Odgers B.A., CFP, CSA
Certified Financial Planner
Certified Senior Advisor
Investment Representative

London Life Insurance Company
and Quadrus Investment Services Ltd.
Suite 30, 1150 Terminal Ave. N.,
Nanaimo, BC, V9S 5L6
Phone: (250) 753-9955 ext. 523
1-888-238-0465 ext. 523
Fax: (250) 753-9953
E-Mail: lee.odgers@freedom55financial.com
www.leeodgers.com

To: Anthony Morris

September 15, 2010

Dear Anthony:

I am pleased to be writing this testimonial of your "Practice Builder" program. As I mentioned to you, I have been in many different business coaching programs in the past and your program is by far the most comprehensive.

You provide tremendous insight to the challenges we face on a daily basis with our careers. Not only does your program create a wonderful environment to get the collective creative juices flowing out of the group, the "Practice Builder" website you provide gives us a tremendous amount of tools to work into our businesses.

I have only scratched the surface of the endless scripts and pre-written letters you provide. From approach letters and scripts to pre-written thank you cards, I have never seen such a complete package from any other coach.

My accomplishments in the past year include:

- 150% increase in commission
- 3 of my largest commissions ever
- MDRT qualification
- Freedom 55 Financial Summit Excellence Qualification

Thank you for your support and input into my business.

Kindest regards,

A handwritten signature in black ink, appearing to read "Lee Odgers", written over a light blue horizontal line.

Lee Odgers
Certified Financial Planner
Certified Senior Advisor



Investors Group Financial Services Inc., I.G. Insurance Services Inc.*

Kevin Reid, CFP
Division Director 
Cell: (705) 492-8869
kevin.reid@investorsgroup.com

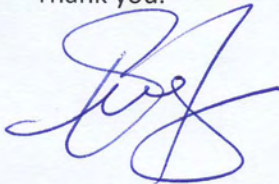
Susie Reid
Consultant
Cell: (705) 493-5369
susie.reid@investorsgroup.com

September 23, 2010

Dear Anthony,

I'm not sure exactly when we started your program, but I just reviewed our most recent 24 reportable production periods (12 months) and what I'll tell is that our insurance production alone from end of Aug '09 to end of Aug '10 compared to end of Aug '08 to end of Aug '09 has increased 586%. Most of that increase has come since enrolling in your coaching program. As committed to this program as we are, things like "life" get in the way, and we can often fall off track with utilizing the benefits of the program fully. So, this being said, I'm absolutely certain that our results could even be more positive than indicated above --- we truly are getting out of this program what we are putting into it.

Thank you.

A handwritten signature in blue ink, appearing to read 'Kevin J. Reid'.

Kevin J. Reid, CFP
Division Director, Investors Group



Investors Group Financial Services Inc.

Suite 101-144 Pine Street, Sudbury, ON P3C 1X3

Ph. (705) 674-4551
Fax (705) 674-3659

Steve Warner
Consultant
steve.warner@investorsgroup.com

January 15, 2010

Anthony,

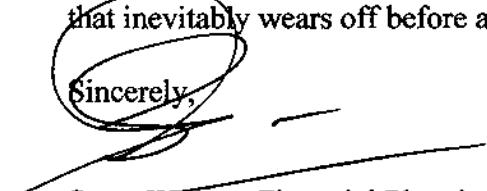
I would like to offer this letter as testimony to the effectiveness of the strategies of your program.

In November you suggested that I identify the top five client transactions of the previous year and send to them at their office a unique gift enclosed with a greeting card for Christmas with some of my business cards. On the greeting card, I offered my holiday wishes and added, "I also wish to congratulate you on transferring the risk of your disability and critical illness from you to me. And by the way, if any of your colleagues might benefit from some of the ideas I shared with you, please do them a favour and introduce them to me." Of the five people I contacted in this way, I received three replies and four referrals. One of the referrals that I'm working with already is in a similar position to the client who introduced us. Based on that alone I expect to receive gross sales commission in excess of \$7,000.

I have attended many seminars and workshops in the past in an effort to find innovative tools to increase my client base. Your modules, by far, surpass any I have experienced, providing real results achieved through a practical, professional and current modality.

I highly recommend your strategies for their effectiveness. Anyone who puts your modules into action can be assured of results and a professional profile that is client focused and rewarding for both involved. Your methods go beyond the standard residual motivation of other presentations that inevitably wears off before any positive and lasting change can be realized in one's practice.

Sincerely,



Steve Warner, Financial Planning Consultant
Investors Group Financial Services Inc.



www.jdlyoninsurance.ca

jim@jdlyoninsurance.ca

June 8, 2010

Hi Anthony,

Although I have not yet completed the program, I have seen a dramatic change take place in my business practice, not just in revenue growth, but in my overall business focus and the methodologies that I now use. I currently have a much more positive outlook in both my personal life and my business life and I attribute this directly to your optimistic and positive personality that you bring with you to every lesson.

As you may be aware, I am relatively new to the Financial Services industry, having been licensed for just over 3 years. I started out with a firm that specialized in debt elimination and moved on to become an independent life insurance broker, shortly thereafter.

When I started my own practice, I did not have any specific direction in which I was heading and was taking any business that I could just to generate enough revenue to stay in business. After seeing you speak at a TransAmerica seminar, I was very intrigued, and when you offered your program to all the attendees I jumped at the opportunity and have never looked back.

I now have a definite goal and focus to my business and, as I mentioned to you earlier, I am working on a potential Group Benefits program for a company of approximately 5,000 employees that would generate a first year commission of over \$750,000 (including bonuses). I would never have been able to even be in this position without the direction and guidance provided by your program.

I would, and have recommended your program to many other agents, brokers and insurance companies, and will always continue to do so. The marketing ideas and business management tips provided in the program are a tremendous benefit to anyone who would use and follow them. What makes this course so great, is that you do not market it to any one personality type and this allows everyone to benefit from all the great and varied ideas that you provide, whether they are very conservative or very outgoing.

Thank you for continuing to provide this much needed "service" and I hope that many more people can be exposed to the marketing ideas and solutions that your course provides.

Kind Regards,

Jim Lyon

12 Ravine Drive, Dundas, ON L9H 6K6

Toll Free: 1-888-664-0696 Phone: (905) 627-5778 Fax: (905) 627-0152 Cell: (905) 537-7200



IRON *Wealth* LTD.
Financial Solutions

39 Durwood Place, Unit 2, Waterloo ON N2L 4E5 Tel: 519-747-3000 Fax: 519-747-3077 www.ironwealth.ca

January 18, 2010

Dear Anthony,

It has been 3 years since attending the Practice Builder program with Clarica. From that point in time, I have successfully qualified for MDRT twice (2007 & 2009) and increased my production by 20 percent year over year. It's now my fourth full year in the business.

My wife Kim and I have two girls now, Cadence (3) and Emmerson (9 months). I have raced an Ironman every year since I have been in the business and I train an average of 14 hours per week on top of working 40 - 60. Last year I was fortunate enough to take the entire family to Ironman Germany, spending one week in Frankfurt and two in Tuscany on vacation. I finished my production year in late October 2009 and began planning for 2010.

We have industrialized our process and created a machine that has allowed me to begin transferring my personal leads to new advisors. We have transformed the Tim Horton's coffee into a Starbuck's Latte. I am new to this business and have half of the knowledge than 98 percent of all advisors in the industry. Having said that, I have only been able to apply 25 percent of what you force fed us during those 'Turbo Charged' planning sessions.

The result of all of this has been the ability for me to achieve financial freedom for myself, my family and those who have been working with me in a very short period of time. It has also created a clientele who are completely dedicated to working with me and my team. Oh yeah, did I mention I am in touch with all of my clients quarterly, whether they asked to hear from me or not.

You should have negotiated a percentage of my earnings as payment for your program, because your program is worth 10 times what you charge.

This year I made the decision to leave my block of business at Sun Life and move to a full brokerage model. I am on track to write over \$100,000.00 in new premium, during the first 6 months of this year. I have become licensed in British Columbia, as my client base is expanding and by the end of this year I expect to be licensed and have clients in almost every province.

Thank you my friend for committing your life to improving the professionals in our business and transforming the likes of us worldwide. My entire team looks forward to working with you in 2010.

Sincerely,



Don Andrews

Looking after your Financial Health



Thomas C. Bulloch*, LIC

T.C. Bulloch Financial Services
933009 Airport Road
PO Box 38
Orangeville, ON L9W 2Z5
Tel: 519-942-4687 ext. 224
1-888-591-3339 toll free
Fax: 519-942-4339
tom.bulloch@sunlife.com
www.sunlife.ca/tom.bulloch



January 18, 2010

The Anthony Morris Group
The PracticeBuilder Program
30 Centurian Drive, Suite 109
Markham, ONT, L3R 8B8

ATTENTION: Anthony Morris

Dear Anthony,

In the past three years, since participating in the Practice Builder Program, my business has changed in so many ways.

I have had annual growth of over 25% in my Group Benefits practice as well as my Asset and Life book. All this while taking 3 months off each year!

We have made us more referable and have elevated our relationship with our customers to a level that ensures ongoing new business and virtually no loss of customers.

My staff are efficient and there is a sense of order in all that we do.

My son, 4 years in the business, will soon be doing the program and I am excited that he will experience your passion, humour and common sense in building his practice.

Warmest Regards,

A handwritten signature in black ink, appearing to read "Tom Bulloch".

Tom Bulloch



We take great pride in providing the highest customer service to our clientele

January 21, 2010

Anthony Morris
The Practice Builder Program

Dear Anthony:

Just a quick note to thank you for some of your ideas that I am implementing into my business practice.

One of the first ideas I implemented was to deliver a birthday cake to my Top 10 referral sources. The first one I delivered to was a mortgage broker I work with. I had a chance to share cake with the mortgage broker and his co-workers. Within a couple of weeks he referred me to three new clients. The new business commission on these clients will be in the \$5,000 range. Pretty good return on a \$25 cake!!

Sincerely,

Terry Bialek



31 December 2009

The Practice Builder Program
Markham
Ontario
Canada

Dear Anthony

Many thanks for the Practice Builder Program you conducted for our advisors over the past year. Your systems, techniques and plug-and-play client-building strategies have made an enormous difference to our advisor productivity.

For the record, we achieved a 24% increase in production, significant, especially since the coaching happened during the most turbulent year in recent history as you know. Across the board among all the attendees we saw new records in the following areas:

- New client acquisition
- Number of referrals generated
- Number of strategic alliances formed with Accountants and Attorneys
- Average case size
- Average case count
- Personal revenue increases over previous year.

We look forward to expanding the relationship in the months to come to include many more of our brokers who were not afforded the first opportunity to boost their production.

Kind regards

A handwritten signature in blue ink that reads "P. Freedman".

Peter Freedman
PRESIDENT



Stephen Cox CFP, CSA

Feb 5, 2010

Re: The Practice Builder Program

Dear Anthony:

I wanted to write this letter to say how much I enjoyed your “Practice Builder” program that I completed in 2009.

As a result of combining elements of your program with some of my existing processes, here are some of my results for 2009:

- 1) Qualified for MDRT.
- 2) Qualified for the Desjardins semi-annual sales conference.
- 3) Increased my investment sales by 40% (during very difficult market conditions).
- 4) One e-mail campaign generated \$7000 of commission from one sale!
- 5) Received a reimbursement of tuition from DFS of \$2000.

For anyone who is looking for easily implementable ideas to help them to stand out from the crowd, and increase their business, I would definitely recommend that they participate in your course!

It was one of the best investments in myself that I made last year!

Thank you again!

Stephen Cox



Feb 22, 2010

42 Riddell Street,
Woodstock, Ontario
Canada N4S 6M1
Tel: 519.537.2216
1.800.435.9077
Fax: 519.537.8778

www.gemfinancialgroup.ca
www.benefitquoteguide.com
gemfinancial@gemfinancialgroup.ca

Mr. Anthony Morris
The Practice Builder Program
30 Centurian Drive, Suite 109
Markham, ONT, L3R 8B8

Anthony,

I wanted to take the time to let you know how absolutely life changing the Practice Builder Program has been for me. Not only has it helped to focus my efforts in working with the correct demographic, but it has also translated into an overall increase of 31% in revenue over the last 12 months. That growth, most of which is generated by an average of 1-2 new clients in our target demographic each month over last year, is just the beginning. The client service model discussed in the program and the actual suggestions on how to correspond with both my clients and prospects has facilitated stronger relationships with my clients and has also led to more reliable and efficient administrative systems in our office. We are clearly and undeniably more organized and operating more closely to our optimum level than we have ever been.

After having been stagnant in this business for nearly a decade, I have found renewed excitement and passion for financial planning and providing meaningful solutions to those I work with. Thank you for offering a program that can have such a tangible impact in such a short time.

Thank you again for such a truly valuable program.

Martin Caldwell
Financial Advisor and Wealth Consultant
www.martincaldwell.ca



Michael E. McEathron
Advisor

961 Western Avenue
Peterborough, ON K9J 5W2
Tel: 705-874-9221 ext. 0
Fax: 705-742-4838
Cell: 705-761-4797
mike.mceathron@sunlife.com
www.sunlife.ca



January 18 2009

To All Future Practice Builder Attendees

My personal journey with Anthony Morris began in the fall of 2005. I attended the one year practice builder course and my production increased over twenty percent. I am now on the course once again in 2010.

The material is new fresh and fun. I have never had so much fun, and been provided so much content at the same time. If you're looking to take your *PRACTICE* to another level with fresh fun and new ideas this is the course for you.

I am using the personal digital recorder for all my client meetings as a way to limit liability and at the same time be sure that we are offering clients the absolute best advice. I have had some instances where clients have challenged my advice and it is so easy to just send the clip of the meeting were there concern was addressed. It actually strengthens client relationships.

This is just one of the great ideas I have implemented from the Practice Builder Course. Anthony is a master of the human language and will have not only have you acting but also speaking like a true financial advisor.

This course is a great investment in your career, make the investment in your clients, your business and yourself enrol in the practice builder course today!

Sincerely

A handwritten signature in black ink, appearing to read "Mike", with a flourish at the end.

Michael E McEathron