

▶ Speaker ▶ Industry Evangelist ▶ Coach

ANTHONY MORRIS

Does Your Present
Have a Future?



▶ Passionate ▶ Powerful ▶ Practical

topadvisor
program inc.



See What Industry Leaders Are Saying...



What MDRT Presidents and Industry Leaders Say

“

“If you want a powerful speaker who will pour some “rocket-fuel” into your practice, put him on your program. His creative marketing ideas and ability to deliver sets him apart. Advisors need the HOW behind client-building, not just the WHAT. They want to move past inspiration to application. Anthony’s step-by-step process and tools are among the best you will find anywhere. Book him today!”

- Guy Baker
2010 MDRT President

“

“I have shared the platform with Anthony Morris numerous times over the past 10 years. Every time I come away with a page of fresh, unique concepts to help my business. His passion and practical ideas know no bounds. Audiences have always been WOWED by his high-energy, humorous style and plug-and-play strategies in the areas of prospecting and client-building. Book him today for a show-stopping experience - your audience will be delighted you did.”

- Phil Harriman
2006 MDRT President

“

“..an excellent communicator. Really “gets” the industry - the ideas are both creative and practical...allowing advisors to readily incorporate them into their business.”

- Jim Rogers
2008 MDRT President

“

“Anthony’s message and delivery is hot property in these tough times. Agents and advisors need real TOOLS to boost their income and client-building. Strap yourself in for a brilliantly-timed, idea-a-minute program - delivered with maximum passion and punching impact. His global speaking and coaching experience bring crucial perspective to every audience as our industry re-defines itself”

- Tom Hegna
International Keynote Speaker

“

“...powerful and transferable ideas that will make you more money tomorrow morning.”

- Marc Silverman
Past Chair
MDRT Top Of The Table

“

“I toured Australia with Anthony on an MDRT road show. I was astounded at the sheer volume of top-shelf, immediately-transferable sales and prospecting ideas he was able to pack into his high-energy session. He made the MDRT brand proud and I would recommend him without hesitation to any event planner looking to lift their audience to their feet and have them rushing out the door to use what he teaches. Powerful stuff! ”

- Brian Ashe
2000 MDRT President

“

“...knows the business inside out. If you put his advice into practice you will improve your productivity & your profit.”

- Tony Gordon
2001 MDRT President

topadvisor *program inc.*

a n t h o n y m o r r i s

Anthony Morris is an International Keynote Speaker & Practice Development Specialist working exclusively in financial services. His organization conducts coaching programs on 5 continents involving over 100 international companies. He was a Main Platform speaker at the 2007 MDRT Top of the Table Meeting and has spoken at MDRT meetings globally from the USA to Dubai, Singapore and Australia. Anthony has worked at every level of major companies as one of North America's most sought-after keynote speakers and client-building coaches since his immigration to Canada in 2007. Platforms ranging from MDRT to major blue-chip agency and producer groups have benefitted from the practical, step-by-step systems and techniques he shares in sessions that are as passionately presented as they are immediately useful. Review the below recent feedback from program attendees and book your place today on an upcoming seminar guaranteed to jolt you from your comfort zone and transform the way you view and do your business in all areas from prospecting and client referrals to upselling and technology deployment. Advisors describe his systems as having dramatic impact on their immediate production and lasting influence on their business DNA. Anthony presents shocking facts, science, math and indisputable evidence to back up the client campaigns, conversations and conceptual selling models you will learn about. Working with every level from new advisor to industry legend, he has the global perspective on current "best practice" to deliver an extraordinary message to any group who grant him the privilege of their platform Always engaging. Fresh, new ideas. Brilliant plug-and-play content. He will make you laugh, think and remember.



see what people are saying



"I have never seen such a complete package... 150% increase in commission"

- Lee Odgers, Freedom 55 Financial. Nanaimo, BC



"I just reviewed our most recent 24 reportable production periods (12 months) and what I'll tell you 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."

- Kevin Reid, Division Director. Investors Group. North Bay, ON



"You should have negotiated a percentage of my earnings as payment for your program, because your program is worth 10 times what you charge. I am on track to write over \$ 100 000 in premium for the first 6 months of this year."

- Don Andrews, Ironwealth Financial Solutions. Waterloo, ON



"In the past 3 years since participating in the program, I have experienced annual growth in my Group Benefits business of 25% a year – as well as my Asset and Life book. All of this while taking 3 months off each year!"

- Tom Bulloch, Sun Life Financial. Orangeville, ON



"I have now reached over 9 million NBC by the end of December 2010. This is after achieving between 4.2 and 4.9 Million for the last three years."

- Norman Piche', Division Director, Investors Group. Sudbury, ON



"As a result of combining elements of your program, my investment sales grew by 40% last year - one e-mail campaign generated \$ 7000 from a single new prospect. This during very difficult market conditions"

- Stephen Cox, Desjardins Financial Security. Halifax, NS



"After one year I have increased my insurance sales by 50% and overall business by 87%. The modules, letters, templates and support has been everything I have been trying to create or find since starting my practice in 1992"

- Renee Wilkins, Investors Group. Burnaby, BC

Double your income

AND WORK LESS

POWERFUL
ALL-NEW
SEMINAR

- ✓ 5 Brilliant uses of technology to secure more new client meetings
- ✓ Get current business clients introducing you to their accountants and start generating a river of high-wealth referrals from them
- ✓ Secure instant warm introductions to wealthy seniors looking to bring “meaning to their money” through their estate planning
- ✓ Build a pipeline of 200 new-generation younger clients to on- sell with your book of business when your succession plan kicks in
- ✓ Use today’s unstable economic conditions to position yourself against the big banks
- ✓ Build your your life and living benefits sales to record levels with referrals costing you less than \$ 15 each
- ✓ Break through to a new level of income in 90 days with a step-by-step approach to “family and friends” marketing whilst overcoming their reluctance to have you know what they “own, owe and earn”
- ✓ Learn how to maximize individual referrals from your group scheme clients

- What are the 5 explosive trends that are positioning some advisors to earn as much in only 90 days as they did during the whole of last year? Join us to learn how to leverage these trends profitably for a breakthrough year.

- How do you get introduced by your strategic alliances in an elegant, conversational way, have prospects hanging on their every word and asking them to arrange an immediate meeting with you? Throw out those boring brochures and replace them with eye-catching tools that fill your calendar with new client meetings every week.

- What are 5 **Powerful** uses of simple technology sitting right on your desk that can boost your personal marketability – even if you are techno-phobic & digitally-impaired? One of them will even get your compliance department jumping up and down with excitement.

- What **simple** strategy can you deploy in the next 6 weeks to write **millions of premium** in charitable-giving policies in your community?

- What are the three questions accountants must ask business clients that will get them to commit without hesitation to reviewing their risk and investment portfolios with you? How do you get accountants and mortgage brokers to refer clients to you in record numbers? Get inside their minds and their client bases will come along for the ride. Come and learn the 3 key phrases and 2 follow-up emails that treble your conversion rate in these relationships.

- Given that most advisers are operating at 1/8th of their financial potential, what 2 practical strategies must you deploy within 48 hours that will lead to breakthrough results by month-end?

- What simple, 2 minute illustrations can you show to any prospective client to raise their enthusiasm for your work

and lead them to immediate action? They fit on the back of a napkin and **no**, you’ve never seen them before.

- **When** and **how** do you position a referral conversation with clients to ensure that they don’t feel pressurized and you don’t feel like you are begging? What is the step-by-step process you need to follow to ensure that those referrals are guaranteed to see you under favorable circumstances following the introduction?

- **When** and **how** do you position the **annual review** conversation with clients to guarantee that they get together with you **every** year to “visit their money” – thereby ensuring you have hundreds of annual opportunities to generate repeat business and new referrals?

20 years experience in 50 countries

GLOBAL CLIENT LIST

MDRT Top of the Table (USA)
MDRT Annual Meetings (various)
World Critical Illness Conference (Canada)
Advocis Banff, Ontario, Kelowna & Atlantic
Schools (Canada)
Freedom 55 Financial (Canada)
Sun Life Financial (Canada)
Investors Group (Canada)
Great West Life (Canada)
Manulife Financial (Canada)
Desjardins (Canada)
Dundee Wealth (Canada)
Cooperators (Canada)
Credential (Canada)
Bridgeforce MGA (Canada)
Financial Management (Canada)
HUB (Canada)
Financial Horizons (Canada)
Ten Star MGA (Canada)
Empire Life (Canada)
Fundex (Canada)
Pro Seminars (Canada)
Canada Life (Ireland)
Kansas City Life (USA)
Zurich International Life (Dubai)
United Bank of South East Asia (Singapore)
National Australia Bank
Citibank (Dubai & Bahrain)
AIG Life (Middle East)

MDRT (New Zealand)
AXA (UK)
Thailand LUA
HSBC (Dubai)
Asia Pacific Life Insurance Congress (Taipei)
Suncorp Bank Australia
Prudential Asia Presidents Convention (Monaco)
Clerical Medical (UK)
Garanti Bank (Turkey)
Qatar General Insurance
MDRT Australia
MDRT Dubai
Lonsdale Australia
Total Financial Solutions (Australia)
Tower Australia
Professional Investment Services (Australia)
Abu Dhabi Commercial Bank
Doha Bank (Qatar)
Australian Financial Services
AIA Malaysia
1st Intl Bancassurance Conference Middle East
AMP (Australia)
AON (Australia)
Nexus (Dubai & Bahrain)
Continental Insurance Brokers Dubai
Middle East Insurance Review
National Bank of Fujairah
Financial Adviser/Financial Times(UK)
Commercial Union (Turkey)

Whether you're new or 25+ years in the business, you will leave with **20 income-producing ideas** and dozens of tools to bring momentum to your client-building

Why Should You Attend?

This globally-acclaimed session poses many provocative questions – and delivers the answers in an action-packed, content-rich fashion.

At the recent Total Financial Solutions (Australia) Convention in Singapore, this practical workshop drew an average rating of 5.7 out of 6 across several hundred top producers for both content and presentation style.

Powerful scripts. Actual communication tools. Techniques. Strategies. Prospecting & referral systems. It's all here – delivered in a show-stopping, idea-every-minute format that draws audiences to the edge of their seat from opening remarks and never lets up until final applause.

In this humorous, practical and action-packed session, attendees will accompany Anthony on a roller-coaster ride of the exact "How To's" of 21st century client-building and differentiation. Arrive equipped with a mind open to fresh thinking and you will depart armed with the weaponry to win today's business-building battle – being fought in a crowded marketplace at lightning-fast speed. Not one for light-hearted puffery or empty inspiration, Anthony invites you to confront the tomorrow's challenge with the tools that already exist in your office and on your desk.

Using several of the exact approaches on offer in this session, thousands of Anthony's coaching clients

across the globe have achieved spectacular increases in revenue and sustained practice-building. You will learn **what** to say to and send to clients and prospects, **when** to do so and **how** to generate a river of referrals in the weeks following the seminar.

This action-packed business make-over presents delegates with real client-building solutions which have been tried and tested across the globe. The ideas are categorized into the 3 areas crying out for immediate attention in the average practice:

- Prospecting for new clients
- Re-vitalizing and up-selling established clients
- Resuscitating neglected clients

This practical seminar details the exact step-by-step approaches required to boost activity momentum and revenue results through working systems & structures which have proven their value in doubling productivity amongst dozens of Anthony's client companies over the past 20 years.

If you have been in the profession for 30 years, you will learn how to commence effective succession planning and dramatically improve your chances of profitably exiting your business. For those in the industry for less than 30 months, you will walk away equipped with over 15 critical strategies to guarantee a smooth transition from Rookie to Superstar – using techniques never shared with you before in your initial training.

These teasers can be used in building excitement for your event with potential attendees. We will customise the content for local, state or national relevance. The below sample is currently used for the Canadian market by Canadian event planners

DEALING WITH THE “I ALREADY HAVE AN ADVISOR” OBJECTION



a n t h o n y ♦ m o r r i s

DON'T MISS HIS UPCOMING APPEARANCE IN YOUR AREA

GLOBALLY EXPERIENCED. LOCALLY RELEVANT. PASSIONATE, PRACTICAL AND POWERFUL.

No one woke up this morning wanting a “second opinion” on anything financial in their lives. And they’ve heard that line from countless advisors before. Here’s a bullet-proof approach to use in converting warm or cold prospects into red-hot meetings in your calendar:

Prospect: “I’ve already got an advisor”

Advisor: “That’s great. I am relieved you’ve received some advice previously. Would you mind if I ask who you are dealing with?”

Prospect: “ABC Financial”

Advisor: “That’s great news, we do lots of work with ABC clients. Would you like to pressure-test the advice you’ve been getting? I have a one page checklist which takes 2 minutes to complete.

Let me email it to you right now, we’ll run through it together and if you don’t see anything interesting, I’ll go away and never bother you again. Does that sound fair?”

Email the prospect the below checklist. Also attach a sample of a financial plan and your company profile/ website link. By the time they’ve reviewed the checklist, you will have disturbed their status quo and re-opened the conversation about meeting with you.

FINANCIAL ADVICE ASSESSMENT

<p>Has a written financial plan been documented and updated at least annually to adjust for changed circumstances, market trading conditions and latest carrier solutions? Yes <input type="checkbox"/> No <input type="checkbox"/></p>	<p>Is the life insurance program inclusive of fully comprehensive critical illness benefits (as opposed to being payable only on death)? Yes <input type="checkbox"/> No <input type="checkbox"/></p>
<p>Have the long term care expenses been accounted for by the plan in order to protect the children’s retirement from the unfunded health issues of the parents? Yes <input type="checkbox"/> No <input type="checkbox"/></p>	<p>Was the appropriate inflation indexing used in creating and funding the plan? Yes <input type="checkbox"/> No <input type="checkbox"/></p>
<p>Was the appropriate life expectancy used in creating and funding the plan? Yes <input type="checkbox"/> No <input type="checkbox"/></p>	<p>Does the plan contain the correct blend of guaranteed income and lifestyle “playcheques” to ensure maximum financial peace of mind free of market volatility? Yes <input type="checkbox"/> No <input type="checkbox"/></p>
<p>Have the necessary allowances been made for legacy contributions to grandchildren’s financial well-being? Yes <input type="checkbox"/> No <input type="checkbox"/></p>	<p>Are the estate plan distributions arranged WITH or WITHOUT values guidelines? Yes <input type="checkbox"/> No <input type="checkbox"/></p>
<p>Has a family meeting been convened at any point to reach consensus on key family issues surrounding long term care, asset sharing amongst siblings and family financial roles in the future? Yes <input type="checkbox"/> No <input type="checkbox"/></p>	<p>Does the plan include return-of-premium coverage on grandchildren/children’s critical illness with funds converted for whole life insurance on the grandchildren/children in the the future? Yes <input type="checkbox"/> No <input type="checkbox"/></p>
<p>I would welcome the opportunity to meet with you (and your current advisor if you so wish) to exchange some ideas on the above issues and ensure that you are receiving the advice and service you deserve. Please contact me to arrange a convenient time for us to get together.</p>	

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5 BRILLIANT REFERRAL IDEAS TO **BREAK THROUGH TO THE NEXT LEVEL**



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FOR CURRENT CLIENTS

For current clients:

"I must have done something to offend you over the years. When I was driving to our meeting today, it occurred to me that you've been keeping me a complete SECRET amongst those you care about most. You've never so much as introduced me to ONE person in your life who should spend some time with me sharing some ideas about their financial plan. Would you feel comfortable forwarding an email introduction I have sent you and making a couple of calls to share my expertise with 2 people in your world? They'll thank you for putting us together"

For current clients:

"As part of celebrating our business anniversary this month, we are facilitating Family Meetings with our current clients, each followed by a Wine and Cheese. Would you be comfortable putting your siblings and parents in the same room with you and I to explore key issues such as estate distributions, long term care independence and powers of attorney decisions? Put me in touch with them and I'll co-ordinate the rest"

For current clients:

"Knowing who you know, if YOU were ME and were looking to expand your business, who would you call on first to exchange some ideas with? Could I ask you to pick up the phone and recommend me – and I'll be sure to do the rest." For the step-by-step conclusion of this strategy, be sure to attend the upcoming Top Advisor Seminar in your area.

For meeting the client's accountant:

"Mr/s Client, your accountant's opinion is going to be required for this proposed solution. Would you be comfortable putting us together so that we can work in harmony on this recommendation? After all, they do the TAX work and I do the MONEY work and it's essential that we co-ordinate as a team in bringing balance to your financial direction." When you call their accountant, say this " Mr/s Accountant, we share a client in (Mr/s client name). I am doing some important re-structuring of their financial plan and need to run my recommendations past you before final implementation. We were hoping there wouldn't be any charges for the 20 minute meeting, but if you need to bill anyone, I am happy to pick up the cost." This step tends to encourage the accountant's positive opinion when they understand that you are positioned to refer them to other clients who need their expertise. It is also a great way of securing a free showcase of your planning service to the client's accountant - who most likely needs your advice as well.

For expanding your work with client's industry association:

" Mr/s Client, are you a member of your industry association? Could you create an opportunity for me to sponsor a door-prize and/or valuable give-away at your next chapter meeting or annual convention? Or secure exhibition space at any trade show or conference?" Be sure to join us at the Top Advisor Seminar to learn WHAT to give away and HOW to run a tradeshow exhibit that delivers DOZENS of clients without delay. One recent seminar attendee secured 120 quality leads and 23 new clients within 8 weeks of implementing the strategy we will share with you.

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CONTROLLING ACCOUNTANTS

WHO DISAGREE WITH
YOUR RISK MANAGEMENT
RECOMMENDATIONS



a n t h o n y ♦ m o r r i s

DON'T MISS HIS UPCOMING APPEARANCE IN YOUR AREA

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Most advisors working in the business risk management market have faced the unfortunate situation of their client's accountant disagreeing with the solutions the advisor has proposed. Understand that the moment accountants start commenting on insurance matters, they have stepped across an ethical boundary in "giving advice" on matters which they may not be licensed/qualified to give.

Use the below letter only in situations where your entire case is at risk of unravelling itself due to the contradictory opinion of your client's accountant:

Dear *(insert name of accountant or attorney)*

We share a client in *(insert name of client)*. Apparently, you have reviewed my recent recommendations for their estate planning/risk management and disagreed with the advice I have given them to *(insert brief description of what your client should be doing)*
Put in place a \$ 500 000 Universal Life policy to offset estate taxes liabilities which their children stand to inherit

OR

Draw monthly compensation out of their corporation to remunerate them for having ceded personal assets to their bank to secure corporate loans/debt

OR

Re-position their shareholder/partnership agreement to accommodate the PROBABILITY of critical illness in the next 25 years as well as the POSSIBILITY of either partner's demise

OR

Make allowance for surviving spouses to achieve full value for their shareholding on their demise, allowing the remaining partner/s to take complete control of the business which the surviving spouse has neither the interest or skill to run.

In terms of compliance rules governing the documentation of my advice to our mutual client as well as to offset potential liability resulting from your contrary opinion, I require your opinion to be documented for purposes of closing the file on this matter. Would you kindly, therefore, email me your professional opinion on the advice I have given *(insert name of mutual client)* to document your standpoint on my suggestions. Optionally, I would like to meet with you to expand your understanding of the underlying justification for my advice so that you have an opportunity to change your own professional recommendations in line with established standard protocols of licensed financial advisors accredited to guide consumers on risk management. I am led to understand you are not licensed in this area currently.

Kind regards,

(insert name of advisor)

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GETTING CLIENTS TO TAKE ACTION



a n t h o n y ♦ m o r r i s

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Use this email in situations where you have had an in-depth conversation with clients and they have now appear to have gone cold, ignore your phone calls or postpone further meetings with you.

SUBJECT LINE: I need your help

Dear (insert name of client)

I sometimes battle to find the balance between professional persistence and making a nuisance of myself. Could I ask for your assistance?

We met recently and discussed some important issues regarding your insurance/investments. I gave you a few ideas of the solutions we could provide to some of the problems you shared and you indicated a desire to think things over.

I am really concerned that you have not taken any action to provide for loved ones/business partners in the event that unforeseen circumstance affects your income.

OR

I am concerned that your current investment portfolio is not working as hard as it could to build your asset base faster.

While I respect your individual choice in this matter, it is my job to remind clients of their opportunities and responsibilities until asked to stop doing so.

To do less would be to turn my back on my strong commitment to (brand) and passion for helping people make their money work harder and smarter for them. Kindly indicate below your feedback so that I may continue pursuing the relationship or close your file:

__ I am not interested in further contact in this matter.

__ Kindly resume contact, I am interested in bringing our discussions to a conclusion and taking action on your advice.

__ Things are really busy this week. I am genuinely interested, but ask that you re-establish contact in __ weeks time.

Please email me your response so that we can bring some finality to the discussions.

An incomplete file exposes me to potential liability issues.

Kind regards

(Name of advisor)

Why Anthony?



Management

If you're an experienced manager in financial services, you would agree that we have plunged into an immense skills vacuum in the last 20 years – as training departments became compliance departments obsessed with liability. The facts are that our industry has been negligent in teaching financial advisors how to MARKET themselves. Most of your teams could literally double their production in the short term if they could just get in front of twice as many prospective “right” clients every month. Unfortunately, many of the traditional programs fail to deliver this solution for three reasons:

- Most of the sales/marketing programs on offer are taught by people without any personal experience of having produced a high level of personal income themselves.
- Many courses focus on the WHAT instead of the WHY and HOW – leaving attendees short-changed on the practical step-by-step, plug-and-play tools required to guarantee attendee success beyond the cozy walls of the conference venue or training room.
- Too many speakers are cramming their messages into 60 minutes. You cannot create sustained behaviour change without longer platform time to ensure integrated delivery and display of the exact steps required to convert the MESSAGE into MONEY.

Powerful scripts. Actual communication tools. Techniques. Strategies. Prospecting & Referral systems. It's all here – delivered in a show-stopping, idea-every-minute delivery that draws audiences to the edge of their seat from opening remarks and never lets up until final applause.

We are a generation of master salespeople - but are we brilliant business people? The month-to-month treadmill of finding, closing and retaining clients too often leads to burnout and ultimately traps most agents and financial advisors in an existence from which they battle to escape, switch off and maximize their lifestyle away from work. Even amongst the ranks of the MEGA producers, our industry is littered with an alarming display of unfulfilled potential, diminished health and declining client-facing opportunity. Simply put- it is getting harder and harder to make an above-average living, ironically in the midst of the greatest time of abundance in the history of financial services.

The real hidden impact of industry regulation has been a "slowing down" of an entire generation of agents and advisors who have forgotten how to be entrepreneurs. Desk-bound and increasingly strangled by compliance issues, many advisors appear to have forgotten that 80% of our non-consulting time has to be spent in new client acquisition. Never in history have so few advisors had the opportunity to counsel so many confused clients and get referred into more key relationships, continuing the process in perpetuity. Any agent or company not

enjoying explosive growth in both client-building and revenues has DO something differently – instead of just TALKING about it.

In his humorous, practical and action-packed sessions, Anthony leads attendees on a roller-coaster ride of the exact “How To’s” of 21st century client-building and differentiation. Deliver him to an audience with minds open to fresh thinking and watch them leave armed with the weaponry to win today’s business-building battle – being fought in a crowded marketplace at lightning-fast speed. Not one for light-hearted puffery or empty inspiration, Anthony invites you to confront the tomorrow’s challenge with the tools and opportunities that already exist in your office, market place and on your computer.

Using several of the exact approaches on offer in this session, thousands of Anthony’s speaking and coaching clients across the globe have achieved spectacular increases in revenue and sustained practice-building. Attendee learn what to SAY to and SEND to clients and prospects, WHEN to do so and HOW to unleash a torrent of new business in the months following his sessions.

His practical seminars detail the exact plug-and-play approaches required to boost activity momentum and revenue results through working systems & structures which have proven their value in doubling, trebling and often quadrupling production amongst dozens of Anthony’s client companies over the past 20 years. Review strong written feedback and video testimonials at www.anthonymorris.ca

If your conference attendees have been in the profession for 300 years, they will learn how to commence effective succession planning and dramatically improve their chances of profitably exiting their business. Advisors in the industry for less than 3 years will walk away equipped with critical strategies to guarantee a smooth transition from Rookie to Superstar – using techniques never shared with them before in their initial training.

As a bonus, Anthony is also available to work with your management team on the issues of recruitment and retention when he visits with your next audience.

Top Producers

- Do you often suspect that you’re getting “some” of your client’s business – but they’re still not 100% loyal and committed to handing you the keys to their financial kingdom and entrusting you to become their financial guardian in ALL areas of their wealth accumulation and risk management?
- Does your practice – even after all of these years of experience – still need some renovating and fine-tuning; some automating and industrializing –as you strive to break through barriers to the level of MEGA producer?
- Is your marketing somewhat “stale” and “old school” – needing some brilliant fresh ideas and strategies to attract those premium, high-net worth referrals on a more regular basis?
- Do you feel like you’re spending years sacrificing your health for your wealth, but have not yet built an actionable succession plan to unlock the real value from your client base as you move into the second half of your professional career?
- Are you tired of speakers delivering empty inspirational content, leaving you staring at the blank conference notepad in front of you - devoid of real action-able ideas that can make you more money WITHIN 24 HOURS of their delivery? As you listen to the speakers, you occasionally pick up your pen as you strive to find the “silver bullet” amongst all the advice you’ve paid for (in entrance fees and time).

As an advisor established in the business, your world is one of solid activity, improved client service and enhanced confidence – with bigger expectations and lofty financial goals occupying your dreams!

A significant challenge you face is automating your marketing and reducing downtime. A further issue to confront is attracting higher wealth clients to your practice and increasing referral flow from the many new clients you have secured over the last few years. Anthony is here to help. In his high-energy, action-packed sessions you will find literally dozens of tools, strategies and systems you’ve never seen or used before.

Nothing is left to chance here and you are sure to make quick gains in opening new niche markets and creating a river of warm referrals. Being willing to re-invest part of your steady income in this process is essential as you explore the dozens of choices he offers in building your business.

You are sure to make quick gains in getting in front of high net worth prospects while upselling your current base. Reducing less profitable activity by creating a “super system” and “putting your business on steroids” are natural by-products of every program Anthony presents.

Share our story with your manager, invite us into your next convention or regional event and watch the run-away success stories multiply.

New Advisors

- Do you frequently feel that you are only scratching the surface of your true potential in your business?
- Are frustration and lack of focus a part of your daily career experience? Not knowing WHAT to do next in order to deliver harmony and consistency to your business building?
- How much precious time of yours is being wasted by clients who just don't “get it” when you're with them – resulting in you leaving money on the table (or in the hands of their current agent or advisor)?
- Has your business imprisoned your lifestyle to the point that you feel you're not reaping the family and financial freedom rewards that attracted you to this career in the first place?
- Are you tired of serving a sentence in the MENTAL JAIL of unpredictability, inconsistency and diminished income potential?

If these issues resonate with your current challenges, you've come to the right place.

As an agent new to the business, you're probably experiencing a roller-coaster ride of anxiety, cautious progress and more questions than answers- with pockets of opportunity in between!

The biggest challenge you face is grasping the habits of sustained activity as quickly as possible – whilst trying to stay focussed on income-producing activity as the complexities of client service challenge your schedule. You need to also reduce non-income producing work and time spent on smaller clients.

In each of Anthony's keynote presentations and extended conference workshops, you will find many of the critical marketing tools, referral strategies and closing techniques to ramp up your results with no time lag required.

Here you will find many of the client conversations, sales ideas and prospecting systems to build an unstoppable foundation for the future. You are sure to make quick gains in raising your level of activity and bringing consistency to your income. The investment of TIME during a period where MONEY is tighter will pay rich dividends as you deploy the dozens of tools provided in his offering.

Invite Anthony into your next sales meeting or conference to deliver quick gains in balancing your activities and transitioning your month-end from a white-knuckle ride into a celebration.

Meeting Planners

Book a speaker with a DIFFERENCE. One who occupies the top slot in evaluations more often than not. And attracts rave reviews accompanied by the regular comment “He should have been given more time at the conference”.

Visit Anthony's website www.anthonymorris.ca, where you will find everything you need for a bullet-proof partnership with Anthony at your next conference, sales meeting or management event.

Your audience will thank you for bringing him onto your next platform.

Investors Group Financial Services Inc.



Hello Anthony,

It is my pleasure to offer some feedback on the guidance I have been receiving from you since the beginning of the year. I would like to start off by saying that I am an advocate on listening to motivational CD's and have attended many different sales related conferences and presentations.

I would like to thank you. I can really connect to your approach and information shared. You speak with sincerity and directly to what we do for individuals in our lives and the impact we have.

As importantly, you share the scripts and the process as to how to approach to be a great advisor and encourage us that if we really want to take it to the next level, we should consider doing the following....

However, since your course, which I have recorded and listen to fairly often, I have now reached over \$7.2 Million in new investment money at the end of October and I still have two months to go. This is after achieving between \$ 4.2 and \$ 4.9 Million for the last three years.

You have had a great impact on my practice and more importantly to the individuals I communicate with on a daily basis. I appreciate and am excited of what the future holds. I strongly recommend other consultants who want to take their practices to the next level to make the investment of signing up for your course and to listen to your great insights.

Again, I thank you very much and appreciate your natural talent of helping financial consultants achieve their full potential.

Those consultants will enjoy a great career by truly assisting those around them.

Much appreciated,

*- Norm Piché, CFP
Division Director*



I would like to thank Anthony Morris and his program for inspiring myself and the entire Hamilton Region office for such creative marketing secrets that are by far different than most trainers I've ever experienced. In terms of results my personal NBC has increased approx. 100 percent. Overall recruiting for Hamilton has also increased contributing to the results year to date. More importantly he has helped over-all with new recruits become more productive using his techniques which I share with them in my division meetings.

*- Guido I. Camaiani
Division Director*





Hi Anthony,

I wanted to thank you again for your passion and your massive volume of fantastic ideas.

After module one, the ideas that I took from that meeting alone brought me

4m NBC. That was followed up by another \$1.8m NBC because of the tools you have provided. Trust me, I'm just getting started and I'm very excited for the next years.

I hope to see you again, thank you very much.

**- Rod Gibbings, CFP BA Econ.
Senior Financial Consultant**



Since I know you like the success stories, the one big client I got with the cupcake deliveries has just netted me 2 of his 30ish children and their families. Total of 10 insurance apps, 45K in RRSP loans, \$30K RRSP transfers, \$2500/mth savings plans, 1 more referral from one of the wives, and the original \$640K I got previously. Assuming the apps close as applied for that totals \$994K NBC from 18 cupcakes by year end.

See you soon

Scott

**- Scott Syrja, CFP
Financial Consultant**



Hi, Anthony,

I want to express my gratitude to you as a coach and the Top Advisor Program that I attended in 2011.

These are some of my achievements in my best year ever in IG since 2006:

- NBCs: 2.4 million up to oct 31st, 2011
 - Top five in Kanata region
 - 2nd in my division
 - Top 15 in (my tenure 2006) of 177 consultants
 - Achievement level 4 for 2011 from AL 2 in 2010
- Insurance: 700,000 NBCs
 - Top 10 in Ottawa
 - Top 3 in Kanata region
- Mortgages
 - Top 3 in Ottawa
 - Top 2 in Kanata region
- Solutions Banking
 - Top 3 in Kanata region
- Client Acquisition
 - 23 New clients

You encouraged me to think out of the box and be confident enough to disturb people and make them to make decisions and avoid procrastination. As well, my Assistant Cristina was motivated after the sessions to work harder and implement new concepts and ideas to improve our productivity.

Some concepts that Cristina and me used this year:

- e-mail Templates to invite, confirm apps but with a concept or disturbing message
- the health Tsunami and Bermuda triangle concepts
- the B-day party cakes
- scripts for prospects not answering phone calls or e-mails to reconnect with them
- financial planning template
- top 50 clients club
- small quotes to start conversations with suspects in coffee shops, gym, social events to invite them for meeting one

Again THANK YOU to show me that the future is... NOW! And there are no excuses to fail. I wish you the best for you and your team.

**- Carlos Rios MSM B.Bus. Adm
Financial Consultant**





Hi Anthony

Just wanted to tell you how much I enjoyed the year of coaching. A year ago, after 26 years in the business, I was pretty worn out and burned out, and planning my retirement. I went to your session, and it was like someone turning the light switch on. I found your sessions to be very motivational and more importantly they really validated our self-worth. After each session, I implemented several of your suggestions. In this business, results are not always instant, however the snowball is starting to roll again. In October I submitted transfers in, of over \$1 million that are a direct result of your ideas.

I very much hope you will be back next year as I would like to continue the sessions. You throw so many ideas at us, that the light bulbs are popping non-stop. I would love for IG to implement this program to the newer reps. I think it would really help them in building their businesses.

Thanks again,

- **Susan Kelly**
Executive Financial Consultant, CFP, CSA 



Dear Anthony

I have been following up with the 58 clients I sent the DVD's and Estate Planning books. Results so far:

4 – existing clients. \$69,000 signed transfers and/or cheques received.

3 – existing clients. Promised to signed transfers or drop off cheques totaling \$170,000

2 – referrals. Both became clients. \$735,000 in transfers signed. \$2.1 million more to be signed after we finish an investment strategy which will save them a lot on income tax.

1 – existing client will give us the first opportunity to finance all the new cottages to be built on their lake front development.

A total of 10 deals out of 58 contacts and I have not even finished my follow up.

- **Kevin Dyer**
Senior Financial Consultant, CFP 



Dear Anthony,

I would like to thank you for taking the time to come to Edmonton during one of the snowiest and coldest winters on record.

I just finished your course and I wanted to take the time to tell you my story. I started with Investors Group July 2008. The markets fell day after day during my first 7 months. I managed to keep my head above water and I even hit pillar that year (1,125,000), although it wasn't by much. During my second year the markets started to recover and my business started to take off. I hit pillar (1,596,000) but again I was just keeping my head above water. Then I started your course summer of 2010.

My last 9 months on your course I have brought in \$ 2.6 million of new investment money and I have sold 40 insurance policies (top 3 in Edmonton). I just hit my 3rd year pillar, which is 4 months early. I currently have increased my business by 37% already in 2011 over 2010.

Your course has given me confidence and the power of words. One of the greatest assets for me is your website.

It allows me to spend more time marketing and less time writing the perfect follow up letter, or the perfect prospecting letter. My goals for 2011 are to maximize one of your marketing ideas each month.

I look forward to adding a zero to my commission this year.

- **Krystle Bouvier**
Financial Consultant 



Hi Anthony,

Over the course of a year, in 6 modules and at a reasonable cost, The Top Advisor Program has provided me with a war chest of ideas, concepts and tools to use to update my business, attract new clients, and increase the value I offer to my existing clients. In my 25 years in the investment business I have taken many courses to improve my practice but only Anthony Morris's program has resulted in positive results in the areas of client acquisition, systems streamlining, and revenue—I experienced a 50% increase in income by the 3rd session.

Most importantly, though, my clients are benefitting from the valuable, up-to-date information available to me on a lifetime basis from the Practice Builder Zone website. I emphatically endorse the program.

*- Kate Flanagan, B.A., CFP, EPC
Financial Consultant*



Hello Anthony,

I have been away from the office since our last module, so I'm just getting the opportunity to reply.

I was relieved to hear at our last module that often results aren't seen in the first year. However, I can offer the following: year to date, my 22 placed insurance cases are more than the combined placed cases in all the years I have been with Investors Group (this is my 10th year). I attribute this to a heightened awareness of the risk management side of my client's files delivered through the modules of the course and the resulting realization that it isn't so much about the "selling" but the necessity to position our clients with the proper tools to protect the asset accumulation strategies we have put in place. I feel less apologetic about bringing up the concepts and simply deliver them as an essential part of our overall planning process.

As for the long term benefits of this course, the results are more likely to be seen in the next year and beyond as the follow up to my 10 Things Book and "rediscovery of IG" program for existing clients with external assets comes to fruition. There has been a great deal of time committed to building better servicing systems and regular contact with clients that is becoming more automated with my assistant Jenn. I feel more connected with my current clients and more confident about approaching referrals with a "wow" factor. Presenting them with a prospect version of the 10 Things Book will demonstrate the depth of the planning relationship they can get through me and Investors Group.

I am particularly appreciative of the modular approach to this course.

Too often (very often!) we attend one-day training sessions that provide wonderful ideas and breed enthusiasm, only to have the information "put on the back burner" once we get into the regular grind. The modular approach gives us the opportunity to learn, get excited about changes, be "human" and then have another chance to finish what we started with the best of intentions. Refining what we do takes time and this course keeps us on track to becoming much, much better at what we do.

Thank you,

*- Susan Weiskopf
Financial Consultant*





Good afternoon Mr. Morris!

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.

FYC-wise increase of just under \$23,000, insurance premium increase of about \$47,000 annual premium. Since coming to IG 4 years ago, our insurance production fell a lot. Became more asset focused and really wanted to get back in the insurance business as well.

Thank you.

- **Kevin J. Reid, CFP**
Division Director  **Investors Group**



I would highly recommend the Top Advisor Program, after one year I have increased my Insurance sales by 50% and overall business by 87% The modules, letters, templates and support has been everything I have been trying to create or find since starting my practise in 1992.

The success of the programme I believe is due to the regular quarterly meetings and reviews.

- **Renee Wilkins, EPC, CLU**
Financial Consultant  **Investors Group**



Hi Anthony,

In my 16 years as a financial advisor at Investors Group, I have qualified for President's Club 5 times (all in the last 10 yrs.) and am consistently in the top 7% of production amongst all Consultants in Investors Group.

I have attended many courses whose Instructors' aims are to help me build my business. Anthony Morris delivers an exact step-by-step process – in fact a Manual – that allows me to maximize Client-building and Client retention.

The Top Advisor Program is unique in its delivery of not only the WHAT and Why, but-most importantly-the HOW of business building, client acquisition and maximizing my referrals.

The investment in the Top Advisor program fee is the cleverest use of their money that any of my colleagues can make if they are committed to breaking through to the next level of income. Ideas matter. Anthony Morris shares hundreds of ideas whose proper execution will grow your business.

Regards

- **Mary Preston RO # 28 Investors Group**
Financial Consultant  **Investors Group**

20 Years Experience in 50 Countries

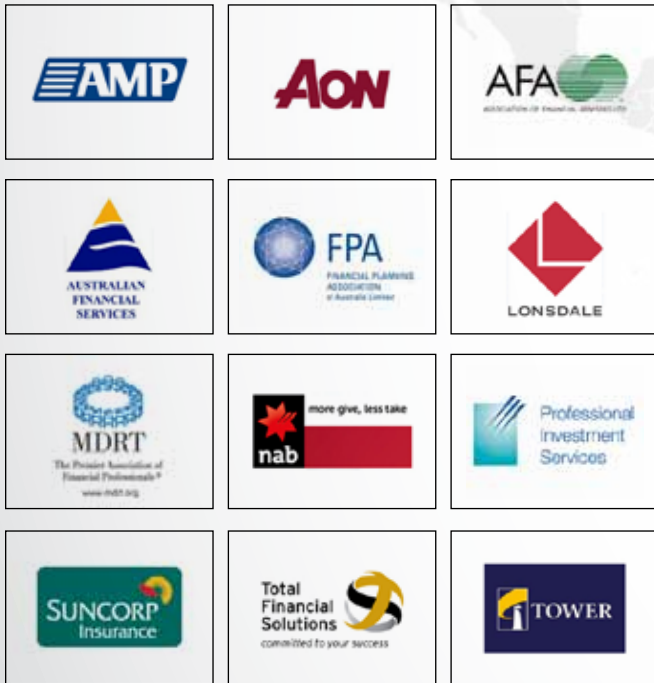
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Australia



Botswana

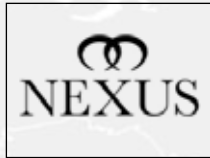


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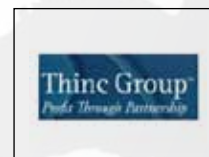
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Mauritius



Singapore



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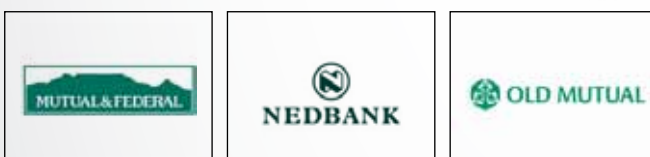
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20 Years Experience in 50 Countries

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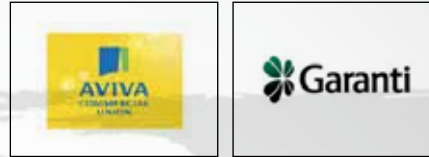
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Thailand



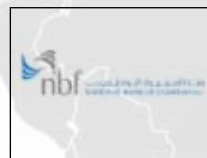
Turkey



United Kingdom



United Arab Emirates



USA



a Message from Anthony

Dear Advisor,

I have spent the last 20 years engaged in the most intensive global search for the very best practical strategies to transform your business. You've heard the rest – join us for the **best**. You will benefit from an explosive program **guaranteed** to jolt you into action and sustain your client-building at a much higher level than ever before.

Rather than empty inspiration or theory, I will equip you with immediately – transferable skills, templates, systems and techniques that are proving themselves in boosting our thousands of successful coaching

client's production to the next level.

I cannot imagine anything being more important to your business future than the session we will share together at the upcoming seminar in your area.

There is a small investment of your time for attending. The cost of missing this powerful session is much higher.

I look forward to warmly welcoming you to session.

Regards,

Anthony Morris
International Practice Development
Coach & Keynote Speaker

Anthony Morris



Book Anthony Today for a **High-Energy, Income-Boosting Session**

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