Stephen Wershing, CFP®

Speaker Author Coach

"Steve Wershing is the best marketing mind in the financial planning profession."

-Bob Veres
Publisher, Inside Information

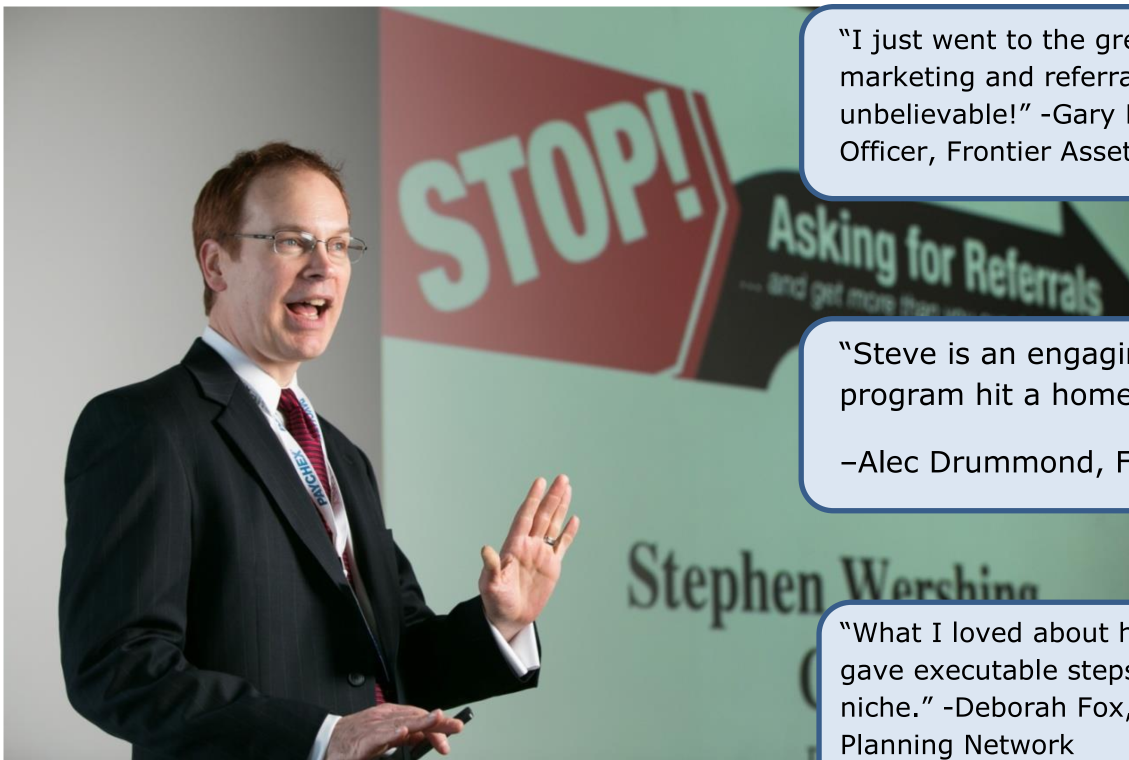
"Steve was the only speaker who received a perfect rating."

-Brenda Thornton
FPA Chapter Administrator

"Steve Wershing is one of the most articulate speakers I've ever heard."

-Marie Swift
President & CEO
Impact Communications

Offer your audiences an experience they will be talking about all year, and ideas that will revolutionize their businesses



> "I just went to the greatest presentation on marketing and referrals. Steve Wershing is unbelievable!" -Gary Miller, Chief Investment Officer, Frontier Asset Management LLC

> "Steve is an engaging speaker, and his program hit a home run."
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> –Alec Drummond, FPA Chapter President

> "What I loved about his presentation is he really gave executable steps on how to establish a niche." -Deborah Fox, Founder, Fox Financial Planning Network

A PERSONAL MESSAGE FROM STEVE

I'm Stephen Wershing and I'm on a mission to help your audiences attract more referrals.

Ever wonder why advisors still struggle to get referrals? Because most of what they are told about referrals is wrong. And I want to help change that.

I am President of the Client Driven Practice, LLC, and we coach financial advisors on how to create referral marketing plans that work.

After 14 years as a broker dealer executive and 25 years as a practitioner, I wanted to focus on what was always the best part of those jobs: helping advisors build their businesses. As I researched what advisors needed most, I made a shocking discovery – that so much of what we have heard and read about attracting clients is wrong or incomplete. I was amazed that actual, scientific research on topics like referrals has only just been done in the last few years. And even now is not widely embraced. It is my goal to change that – and get accurate, research-based principles into the hands of advisors.

I am the author of Stop Asking for Referrals! (McGraw Hill, 2012). I offer tips on practice management and marketing on my blog, and post at least one article a week. I also blog at financial-planning.com, who has dubbed me "The Referral Doctor." I have authored, been quoted in or interviewed for dozens of articles in every major financial services trade journal, as well as on The Wall Street Journal online and USA Today.

Audiences immediately relate to the strategies I show them, and most leave ready to implement them in their own businesses. They are thrilled and invigorated to finally hear about strategies that make sense.

Give your audience an experience they will love, and ideas they will use to become more successful.

Presentations

Stop Asking for Referrals!

(And get more than you ever have before)

Why don't advisors get more referrals? Because most of what they have been told about them is wrong!

During this acclaimed program, you will get what you need to know about attracting referrals, learning innovative new strategies using some of the most recent research available. Steve covers:

- How referrals actually happen (it's not what you think…)
- Why asking for referrals backfires
- How to be the person your clients will refer
- How to train your clients to refer you every time they meet a good prospect
- How to use LinkedIn to find prospects for your clients to introduce you to
- How to cultivate centers of influence
- How to design your own referral marketing plan

Striking It Niche!

(Getting more clients by targeting fewer)

How would you like prospective clients to call you rather than the other way around? How much more could your business grow if your clients referred just the right prospects at the right time for them, and those people actually followed through and contacted you. The secret is niche marketing.

You have probably seen articles about developing a niche and target marketing, but there is so much that they don't cover or even get wrong. This program will present a strategy for developing a niche and capitalizing on it.

- Why is a niche important?
- How focusing on a specific group will make you vastly more successful than trying to attract everyone.
- Defining your niche (hint: it's not demographics, profession or level of wealth)
- Connecting with your niche
- Developing a niche marketing strategy

Secrets of Client Advisory Boards

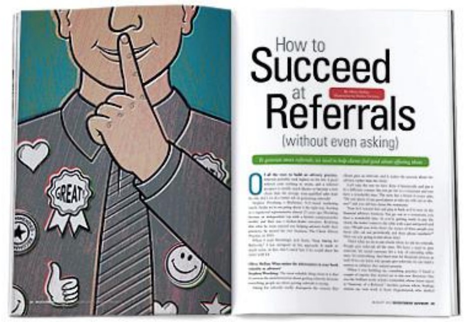
(Engaging clients to supercharge your practice)

A client advisory board is the most powerful tool to deepen relationships with clients, gain greater share of wallet, and drive referrals.

If you want to increase referrals, or want to find out how to get more referrals from your existing client advisory board, this program is you answer. This presentation will show you how to:

- Develop the right objectives for your board
- Choose the right clients to participate
- Invite them to participate in a way that will get them to say yes
- Set up the right group dynamic
- Properly utilize a facilitator to get answers to the most important questions
- Communicate the results of your board
- Increase referrals!

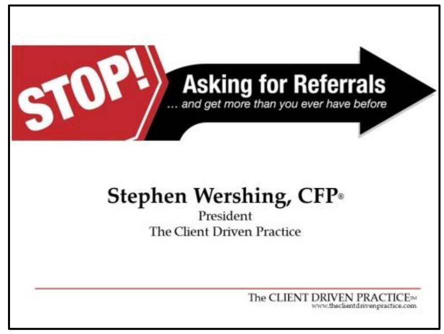
Live from the Tiburon CEO Conference
RegisteredRep TV



Investment Advisor, August 2012

Journal of Financial Planning
January, 2013 (Cover Story)

Dow Jones, Wealth Advisor TV



BrightTalk Webinar
Voted Top 5 of 2012

financial-planning.com, Advisor TV

Speaking Credits Include

FPA of Greater Rochester, NY
Annual Educational Symposium, 2010

FPA Business Solutions
Boston, MA, 2011

Business and Wealth Management Forum
Denver, CO, 2012

AICPA Advanced Financial Planning Conference, Las Vegas, NV, 2013

Keynotes – Workshops – Group Coaching

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