NFP Advisor Services Group

tentative agenda

Leadership. Innovation. Success.

2014 NFP STRATEGY SUMMIT

Tuesday, March 11

11:30 a.m. – 1:00 p.m.	**NFP Lunch**
1:00 p.m. – 3:00 p.m.	**NFP Main Platform**
3:00 p.m. – 3:30 p.m.	**Break**
3:30 p.m. – 4:30 p.m.	**Breakout Sessions**

Panzacola H-1

Portfolio Intelligence: Information at Your Fingertips

Mike McGowan
SVP, Strategic Business Development
Envestnet

If done efficiently, managing portfolios in house can be the key component to an advisor-client relationship. Explore new technology available to help reduce the opportunity cost of managing your own portfolios, improve your decision making and more effectively communicate with your clients.

Panzacola H-2

U.S. Investment Outlook for 2014

Dr. Claus te Wildt
SVP, Capital Markets Strategy
Fidelity Investments

Despite a slow economic recovery since the financial crisis in 2008, most US Equity Markets hit new all-time highs in 2013. The 2014 Investment Outlook focuses on the key growth drivers of the U.S. economy, which have the potential to ignite the revitalization of the US economy and a secular bull market for equities. Learn how you can maximize client return potentials with proper U.S. equity asset allocations balanced with an income-oriented approach to longer term investing.

Panzacola H-3

Commercial Real Estate and Market Cycles

Dr. Glenn Mueller
Real Estate Investment Strategist
Dividend Capital Group

Hear Dividend Capital's research-based forecast on property sector performance and understand how market cycles have affected commercial real estate over the years. Also learn about the financial cycles of the commercial real estate market and walk away with new knowledge of the research behind REIT analysis for a thorough understanding of the dynamics of real estate as "the fourth asset class."

Panzacola H-4

Generating Income in a Low Yield World Panel

Andrew Rosenberger, CFA
Sr. Investment Manager
Brinker Capital

Steve Goldberg
Director, Product Management
Pacific Life

Robert Lewis, CLU
Director, Advanced Sales & Strategic Development
Lincoln Financial

Brian Levitt
VP, Economist & Head of Capital Market Research
OppenheimerFunds

The continued low yield environment of today leaves much to be desired and the need to create income for your clients isn't put on pause until it improves. The appetites for risk vary among them and one solution is no longer sustainable. Join us for a discussion with leading experts on unique investment strategies that are at your disposal as well as solutions designed specifically for providing that much needed stream of income for those clients needing it the most.

Sebastian I-4

Staff Networking Session

Lisa Naeyaert
Director, Education & Development
NFP Advisor Services Group

Cory Davis
Training Specialist
NFP Advisor Services Group

In lieu of a traditional lecture style breakout, we will kick-off conference with a chance for you to connect, learn and foster ideas with your peers. Each person attending will get an efficiency report card to review business processing in your firm. We will discuss the many ways NFP Advisor Services Group can help improve your office's efficiency, the resources the Education & Development team has available and tips and tricks from your peers in offices similar to yours.

*This course has been identified as meeting the "General/Product Knowledge" component of the NFP Firm Element training.

NFP Advisor Services Group

tentative agenda

Leadership. Innovation. Success.

2014 NFP STRATEGY SUMMIT

	1 Hr CFP,CFA CE NFP Gen. Ed. Firm Element Credit *	1 Hr CFP CE NFP Product Firm Element Credit *		
4:30 p.m. – 5:30 p.m.	**Break**			
5:30 p.m. – 7:00 p.m.	**Opening Night Reception and Sponsor Expo |** Sebastian J			

Wednesday, March 12

7:00 a.m. – 7:45 a.m.	**Breakfast / Sponsor Expo |** Sebastian J			
7:45 a.m. – 8:00 a.m.	**Break**			
8:00 a.m. – 10:30 a.m.	**NFP Advisor Services Group Main Platform |** Sebastian K This year's main platform will feature Rick Tsoumas, principal of The Planning Group, as he leads the presentation from an advisor perspective. He'll have your perspective in mind as he presents his views as an advisor on how NFP Advisor Services Group empowers you and your business needs. Next, he'll introduce James Poer for updates on NFP Advisor Services Group. Finally, he'll moderate a Q&A session with the leaders of NFP. Rick Tsoumas, CFP, The Planning Group James Poer, President, NFP Advisor Services Group NFP Leaders Panel: Bruce Callahan, Mike James, James Poer and Stuart Silverman **The Disciplined Pursuit of Less (But Better)** This lecture will speak to anyone who has ever felt overworked but underutilized or always busy, but never productive. Greg McKeown offers a framework for discerning what is essential, eliminating what is not, and removing obstacles in order to make the execution of what is essential as effortless as possible. The disciplined pursuit of less allows employees to channel their time, energy and effort toward making the highest possible contribution to what really matters. Greg McKeown, Author of *Essentialism: The Disciplined Pursuit of Less*			
10:30 a.m. – 10:45 a.m.	**Break**			
10:45 a.m. – 11:45 a.m.	**Breakout Sessions**			
Panzacola H-1 **Beyond Risk Tolerance: What Does a Retiree's Funded Ratio Say About Risk Capacity?** **Rod Greenshields, CFA** Consulting Director, U.S. Private Client Services *Russell Investments* The Russell Retirement Lifestyle Solution, available on	*Panzacola H-2* **Mind over Money: Lessons for Today's Investors and the Impact of Behavioral Finance** **Ryan Madigan, CIMA, CRPS, AIF** VP, Wealth Management Services *Nuveen Investments* This program illustrates how our decision making is	*Panzacola H-3* **Hedging Interest Rates with BDCs** **Derek O'Leary** President *ICON Securities* **Robert Hoffman, CFA** Executive Director, Product Management *Franklin Square Capital Partners*	*Panzacola H-4* **The Evolution of Innovative Annuities and What it Means to You** **Alison Reed** SVP, Product and Investment Management *Jackson National* **Greg Goin, CFP, CRPC** Sr. Sales Trainer, Distribution Training Team *Allianz Life*	*Sebastian I-4* **Marketing the Practice** **Gregg Leslie, CFP** VP Sales *Forefield/Broadbridge* **Jennette Schlinke** Director *NFP Compliance* **Laura Coulston** Sr. Marketing Manager *NFP Marketing*

*This course has been identified as meeting the "General/Product Knowledge" component of the NFP Firm Element training.

NFP Advisor Services Group

tentative agenda

Leadership. Innovation. Success.

2014 NFP STRATEGY SUMMIT

AdvisorEnterprise[SM], is a new retirement planning framework designed to help you develop and sustain an investor's spending plan throughout retirement. It relies on two unique investment capabilities: Retirement Lifestyle Planner and Russell Adaptive Investing.	influenced by human behavior. It discusses behavioral finance concepts and offers guidance to help advisors recognize potential pitfalls and adapt strategies critical in helping clients increase the probability of achieving their goals. **1 Hr CFP, CIMA CE** **NFP Gen. Ed. Firm Element Credit ***	**Deryck Harmer** Chief Strategy Officer *CNL Securities Corp.* This panel will discuss how business development companies (BDCs) can uniquely give clients the distributions they want and potentially be a hedge against rising interest rates in the future. Learn from our panel of experts and your peers about how these programs are designed and how they may be utilized in client portfolios.	**Corey Wilson** Director, Product Research *Prudential Annuities* **Cooper Sinclair, CRC** Regional Director *Jefferson National* The annuity industry continues to transform at warp speed, and with that, the need for creativity and innovation is redefining the way these solutions are being used. The investment platforms are becoming more sophisticated than ever while lifetime income is still in demand. Potential large capital gains and other tax concerns have expanded client needs and your understanding of these new solutions is critical. You will leave this session with a better grasp of the intricacies of these new solutions, how they fit into your practice and why your clients need them.	*Communications* **William Gallegos** Investment Consultant *NFP Advisor Services Group* NFP Advisor Services Group has provided all advisors with a complimentary subscription to Forefield Advisor's presentations, education, newsletters and continuing education. Did you know you also have access to a compliant social media portal and other marketing tools like the Marketing Resource Library? Learn how to get started with these three customized marketing solutions.
11:45 a.m. – 1:15 p.m.	**Lunch / Sponsor Expo |** Sebastian J			
1:15 p.m. – 1:30 p.m.	**Break**			
1:30 p.m. – 2:30 p.m.	**Breakout Sessions**			
Panzacola H-1 **Building Loyalty Within a Diverse Client Base** **Matt Matrisian** SVP and Director of Practice Management *AssetMark* For years financial advisors have been laser focused on identifying, capturing and retaining opportunities within the	*Panzacola H-2* **Investing with Experience in America's Energy** **Fredrick Stoleru** VP *Atlas Energy, L.P.* Investing in energy is no longer relegated to year-end tax planning. Atlas Energy, one of the leading independent energy companies in the United	*Panzacola H-3* **Empowering Women Clients in a Changing World** **Stefanie Nesi, J.D., CFP, AEP** AVP, Advanced Markets *AXA Distributors* Women are an important and powerful demographic in today's economy. However the financial	*Panzacola H-4* **Capitalizing on Free Advice: How AIS Consulting Can Help Your Practice** **Guerdy Jones** AVP, AIS Consulting *NFP Advisor Services Group* **Will Gallegos** Investment Consultant *NFP Advisor Services*	*Sebastian I-4* **The Client Referral Process: Referrals Come in — Now What?** **Lisa Naeyaert** Director, Education & Development *NFP Advisor Services Group* **Cory Davis** Training Specialist

*This course has been identified as meeting the "General/Product Knowledge" component of the NFP Firm Element training.

Leadership. Innovation. Success.

2014 NFP STRATEGY SUMMIT

Baby Boomer generation. Although on the surface an attractive demographic, this client segment is not without flaws. Rising health care costs, rapid draw down of assets and a void in legacy planning are just a few red flags. Within this session, review how client demographics can have a significant impact on the sustainability and growth of your business and introduce data and strategies to help you design a multi-generational practice.	States, has formed Atlas Growth Partners, L.P. to provide investors with income and growth working towards a liquidity event within a short period of time. Learn how an investment in Atlas Growth Partners can help meet your clients' investment objectives. **CE Certificates Offered**	services industry has continued to miss the mark when engaging successfully with women prospects and clients. This course will highlight key strategies in attracting women clients. Then we'll explore distinct financial planning strategies that could be beneficial for a number of clients but may resonate more soundly with women.	*Group* **Michael Wyll** Investment Consultant *NFP Advisor Services Group* Learn how AIS Consulting combines knowledge of advisory services, mutual funds, variable annuities and alternative investments to assists advisor like you every day in designing cases for new and existing clients. Attend this session to see the resources and tools available to increase your efficiency and benefit from more time to generate increased client opportunities.	*NFP Advisor Services Group* Your firm receives a referral from an "A" client, which is great news! Now what? Do you have a measurable process in place that helps increase the success of acquiring those assets? In this session we will break into small, working groups to discuss how your firm receives and handles referrals. This is your opportunity to hear best practices and strategies of others as well as share your best ideas.
2:30 p.m. – 2:45 p.m.	**Break**			
2:45 p.m. – 3:45 p.m.	**Breakout Sessions**			
Panzacola H-1 **Manage Risk Today & Diversify for Tomorrow** **Adam Newell, CFA, CFP** Director of Consulting *DiMeo Schneider & Assoc.* **Mark Mowrey, CFA** SVP, Portfolio Management *Innealta* Diversification is under attack! Are equities overvalued? Are emerging markets slowing down? Are bonds at risk? Please join us to learn more about how a core-satellite structure to	*Panzacola H-2* **How to Compete with the Banks and Wire houses Panel** **Mike Dowling** Sr. VP and Manager *City National Rochdale* **James Liberi** First VP and Director of National Sales *Bancorp* **John Fulgham, AIF** Managing Director, Sr. Investment Consultant *City National Rochdale* Are you ready to compete with the wirehouses and large private banks? The	*Panzacola H-3* **Getting More Out of Your Alternative Investment Allocations** **Neil Menard** Sr. VP, Distribution *Steben,& Company* **Dean Borgh, JD** First VP, Business Development *W.P. Carey* **Derek O'Leary** President *ICON Securities* **Brooks Lindberg** Partner, Head of Distribution Partners *Partners Group*	*Panzacola H-4* **Why Does Asset Class Investing Make Sense in Variable Annuities?** **Michael Parsons** Regional Vice President *Nationwide* **Scott Lamb, CFP** VP, Strategic Relations *Loring Ward* Many Advisors and clients have turned to indexes as a core or total investing solution — and passive investing now represents 24%* of invested assets. While indexing can have many benefits, Loring Ward's Asset Class	*Sebastian I-4* **Annuity Translation: Gaining Perspective on These Products and How They Are Used** **Steve Goldberg** Director, Product Management *Pacific Life* If understanding annuities wasn't hard enough before, the environment continues to change rapidly and the need to stay informed is more important than ever. Join us for a discussion on these products, the current landscape and gain better understanding as to why clients and advisors utilize

*This course has been identified as meeting the "General/Product Knowledge" component of the NFP Firm Element training.

Leadership. Innovation. Success.

2014 NFP STRATEGY SUMMIT

portfolio management may enhance your client portfolios. This session will include a robust discussion surrounding the long-term benefits of disciplined asset allocation complemented by fast-moving, tactical shifts to take advantage of short-term opportunities.	ability to offer institutional asset management, corporate trust services and competitive lending solutions is now available to you. Join us for this insightful session to hear more about how you can leverage the new resources available at NFP Advisor Services Group.	If one alternative investment can give you non-correlated results to the market, think what a well-designed alternative investment portfolio can do? Come listen to how combining equity, debt and hedge alternative offerings may be the secret to reduced volatility and better diversification for your clients.	Investing approach may have even more to offer your clients — including truer asset classes (meaning truer investment returns), low costs and higher potential returns thanks to advanced trading and engineering. In this session you'll learn what Asset Class Investing is and why it makes sense in variable annuities. * Source: Investment Company Institute, 2013	annuities and their features.
3:45 p.m. – 4:00 p.m.	**Break**			
4:00 p.m. – 5:00 p.m.	**Breakout Sessions**			
Panzacola H-1 **The Best & The Brightest: Maximizing your Advisory Business** **Moderated by Rep Advisory Council Member Kevin Ellman, CFP, Wealth Preservation Solutions** Fee based asset management makes up the majority of our investment business, but each advisor has a very different way to manage that business. This idea sharing session is your opportunity to talk with your peers about the questions we all have. How do you best leverage the platform tools available to you? Who are the best managers/strategists? If you want to be the portfolio manager, how do you meet client needs? Don't miss your chance to exchange best practices and learn from	*Panzacola H-2* **The Best & The Brightest: Succession and Acquisition Planning** **Moderated by Rep Advisory Council Members Ann Fenwick, CFP, Fenwick Financial Services, LLC and Beth Richardson, CFP, Maleta Wealth Management** Do you have a written Succession Plan in place for your practice? Over 50% of advisors would answer no to this question. Are you looking to potentially acquire a practice? With the continued competitive environment for financial advisors, having both an emergency succession and long-term succession can provide comfort for you, your staff and your clients for continued success. It also presents opportunities for younger firms to acquire a practice for growth while providing a succession option for an advisor looking	*Panzacola H-3* **The Best & The Brightest: Alternative Investments Forum** **Moderated by Rep Advisory Council Member David Berman, CFP, ChFC, CLU, Berman McAleer** Alternative investments and risk go hand in hand. How are you managing client expectations? What are your best practices for including alternative investments in client portfolios? What are your best explanations you have used with clients when describing these complex products? Engage in a peer to peer discussion about how the risk and reward of alternative investments can payoff in your practice.	*Panzacola H-4* **The Best & Brightest: Recruiting Advisors to your Firm** **Moderated by Rep Advisory Council Member Dan Mulheran, AIF, The KNW Group** Advisors are always looking for ways to grow their practices and one of the best ways to accomplish this is by adding additional producing advisors to your staff. Benefits can include increased revenue, business expense sharing, expertise in new products or services, and optimal staff utilization. Whether you are looking for a seasoned producer or a junior advisor, there are challenges and the process is not always clear. Many of your colleagues have had success in this arena; come hear the experiences and success stories of	*Sebastian I-4* **Find it Fast! Using Annuity Tools Effectively and Efficiently** **John McCarthy, CPA** Product Manager *Morningstar* **Michael Wyll** Investment Consultant *NFP Advisor Services Group* The clock is ticking, you need information on an annuity sold 8 years ago and you need it now. What do you do? Don't panic, we have you covered. Come learn what time saving resources and tools are available for you to help with situations like these and see a demonstration on how to best use the Morningstar Annuity Intelligence Report tool.

*This course has been identified as meeting the "General/Product Knowledge" component of the NFP Firm Element training.

Leadership. Innovation. Success.

2014 NFP STRATEGY SUMMIT

other advisors.	to exit the business. Join us for an open discussion session with your peers to see how they are managing their succession and acquisition needs.		others and share some of your own.	
5:00 p.m. – 6:00 p.m.	**Break**			
6:00 p.m. – 9:00 p.m.	**Dinner – Florida Road Trip |** Sebastian J			

Thursday, March 13

7:00 a.m. – 8:15 a.m.	**Breakfast / Annual Compliance Meeting |** Sebastian K			
8:15 a.m. – 8:30 a.m.	**Break**			
8:30 a.m. – 9:30 a.m.	**Breakout Sessions**			
Panzacola H-1 **Portfolio Insight: Building Portfolios with Liquid Alternatives** **Nathan Thooft, CFA** Managing Director, Asset Allocation *John Hancock Investments* Take the concept of alternative investments a step further with actionable information to help you implement alternatives into traditional portfolios. Hear details about the attributes that make alternatives powerful, including a closer look at correlation, what you should look for in alternatives, key points about portfolio construction and talk about some of the specific challenges associated with selecting alternative assets.	*Panzacola H-2* **Medicare — What Your Clients Don't Know Could Cost Them** **Joe Moklebust, CRPC** Director, Business Development- Retirement Solutions *Principal Funds* One of the biggest retirement worries for people in this age range is the cost of healthcare. In fact, retirees' most commonly selected retirement threat is reduced Medicare benefits. This session covers: The basics of Medicare Parts A through D, Tips for walking clients through the Medicare decision-making process, Answers to common questions investors ask about Medicare and Resources that can help your clients	*Panzacola H-3* **How Advisors are Using Alternative Investments Successfully** **Lee Rawiszer** Managing Principal *Paradigm Financial Partners* **Brian Adcock** President *Adcock Financial Group* **Jim Morrison, AIF, CLU** Principal *Jim Morrison Financial Services* **Mitch Walk, AAMS** President *Retirement Wealth Specialists* **Eric Brotman, AEP, CASL, CFP, ChFC, CLU, LUTCF** President and Managing Principal *Brotman Financial Group* The regulatory environment and independent state	*Panzacola H-4* **Financial Professionals Guide to Estate Planning** **Doug Ewing, JD, CFP** Director, Advanced Markets *Transamerica Life* It's only a matter of time when retirement planning becomes estate planning and today's top advisors recognize how the two go hand in hand. To attract and retain high net worth clients, an understanding of estate planning concepts and strategies is a fundamental part of meeting their expectations. It's also necessary to meet their objectives. This presentation provides an overview of the estate planning concepts every financial advisor should know and is accompanied by a quick reference guide that you can use in your	*Sebastian I-4* **AdvisorComplete: Where We Have Been and Where We Are Going** **Michael Agnew** VP, Product Management Office *NFP Advisor Services Group* Since its launch, AdvisorComplete has continued to evolve and expand the capabilities to increase efficiencies in your office. We will look back at the 2013 enhancements and then review what is planned for 2014. We'll also take a closer look at eSignature, succession planning and annuity processing.

*This course has been identified as meeting the "General/Product Knowledge" component of the NFP Firm Element training.

NFP Advisor Services Group

tentative agenda

Leadership. Innovation. Success.

2014 NFP STRATEGY SUMMIT

	get much needed help. **1 Hr CFP, IMCA CE** **NFP Gen. Ed. Firm Element Credit***	rules have made working with alternative investments limiting. Come listen to a panel of your peers who are working well within the guidelines and successfully including alternative investments in their practice. Hear the tips, tricks and gotchas from advisors leading a practice like yours.	practice. **1 Hr Ins., CFP, PACE CE** **NFP Gen. Ed. Firm Element Credit ***	
9:30 a.m. – -9:45 a.m.		**Break**		
9:45 a.m. – 10:45 a.m.		**Breakout Sessions**		
Panzacola H-1 **Beware of Yielding to the Temptation to Chase Income** **Philip McDonald, CFA, CAIA** Assoc. Director of Research *Symmetry Partners* The low interest rate environment has led to an elevated interest in higher-yielding securities. A portfolio of equities and / or bonds constructed to generate high income will have very different characteristics than a portfolio constructed for total risk-adjusted return. This session will cover several considerations that you and your clients must make before implementing income-seeking changes in their portfolios.	*Panzacola H-2* **When to Sweat the Small Stuff — Beneficiary Planning and Inherited IRAs** **Brian Dobbis, QPA, QKA, QPFC** Retirement Analyst, Private Wealth Group *Lord Abbett.* Small details can make a big difference. Some IRA beneficiary-planning concepts may seem minor, but if not addressed correctly, they can greatly affect who inherits an IRA and how long that inherited IRA may last. This presentation reviews the seemingly small stuff that advisors need to be aware of and will arm advisors with some common sense ideas for building a solid IRA business and making a difference in people's lives. Topics include:	*Panzacola H-3* **Dynamic Duo: A Brand and a Process** **Ted LeClair** *SVP* *Natixis Global Asset Management* To be successful as a financial professional it is imperative to have both a brand and a process. This program will help you develop a strong personal brand and also identify few keys to success in executing a plan.	*Panzacola H-4* **Working Effectively with Widows: Advising and Retaining Clients Through Grief** **Kathleen Rehl, Ph.D., CFP** *Protective Life* It's a fact that 70 percent of widows fire their advisor after the death of their spouse. Learn additional shocking statistics about widows, tips for attracting and retaining this growing population as clients receive education on grief, emotions and the cognitive disconnect that widows experience after the death of their spouse.	*Sebastian I-4* **Navigating AdvisorEnterprise 2.0** **Ashley Green** Manager *NFP Advisor Services Group* Mobile technology is transforming the way we work, communicate and collaborate. You need convenient tools that offer everything to help you manage client assets. Bring your tablet device and learn how to embrace the next-generation of AdvisorEnterprise. All attendees will receive a laminated symbol library.

*This course has been identified as meeting the "General/Product Knowledge" component of the NFP Firm Element training.

NFP Advisor Services Group

tentative agenda

Leadership. Innovation. Success.

2014 NFP STRATEGY SUMMIT

	Beneficiary planning strategies Naming a trust Inherited IRA dos and don'ts (spouse and non-spouse)			
1 Hr CFP CE **NFP Gen. Ed. Firm Element Credit ***	**1 Hr CFP, CIMA, PACE CE** **NFP Gen. Ed. Firm Element Credit***		**1 Hr CFP** **NFP Gen. Ed. Firm Element Credit ***	
10:45 a.m. – 11:00 a.m.	**Break**			
11:00 a.m. – noon	**Breakout Sessions**			
Panzacola H-1 **Keeping Clients Calm and Focused with a Goals-based Approach** **John Anderson** Head of Practice Management *SEI* The global financial crisis and prolonged economic stagnation have impacted investor behavior and attitudes. As a result, advisors have had to adjust their advice and product offerings to win the confidence of more conservative, cautious and hands-on investors. An examination of the client wealth cycle combined with goals-based vehicles and retirement income products will help advisors address the evolving needs of investors of all ages and wealth levels. **1 Hr CFP, CFA CE** **NFP Gen. Ed. Firm Element Credit***	*Panzacola H-2* **Building Better Portfolios with the Next Generation of ETFs** **Ryan Issakainen, CFA** SVP, Exchange-Traded Fund Strategist *First Trust* While it's easy to understand how investors may become overwhelmed by the 1500+ ETFs that trade in the US, this presents a distinct opportunity for financial advisors to add value to the investment process through superior ETF selection. Ryan will demonstrate how looking "under the hood" at a few popular categories of ETFs, ranging from equity income to commodities, can help advisors build better investment portfolios. **1 Hr CFP CE** **NFP Product Firm Element Credit ***	*Panzacola H-3* **The Five Critical Components for Successful REIT Investing: An Understandable, Advanced-level Review** **Mike Van Dusen** Sr. Regional Vice President *Griffin Capital* This session will review the market cycle events coupled with the classic and historic mistakes that have negatively affected real estate investments. Further, we will take a deep dive into the areas we believe provide downside protection, reliable income and appreciation potential. **1 Hr CFP CE**	*Sebastian I-4* **AdvisorEnterprise 2.0** **Ashley Green** Manager *NFP Advisor Services Group* Build and manage diverse models, trade with sophisticated rebalancing tools, and even set customizations down to the client level all with new simplified, intuitive, and streamlined navigation. Learn the benefits of AdvisorEnterprise's rep-as-manager model management and other advanced tools to increase client satisfaction.	

*This course has been identified as meeting the "General/Product Knowledge" component of the NFP Firm Element training.