



Financial Services Clients

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Recent Clients

(Many with multiple events)

Charles Schwab
ING Life Group
Bank of Ireland International Investment Conference
Symetra Financial
National Pension Education Association (NPEA)
Wilmington Trust Company
M & A Source
DBA International (Debt Buyers)
National Rural Utilities Coop Finance Corp.
DaimlerChrysler Services (North America)
Inc. Magazine Financial Symposium
Financial Women International
The Hartford
Wachovia Bank Asset Mngmt. & Inst. Client Services
Western Union Global Agent Conference
National Association of Personal Financial Advisors
Discover Financial Services
Investment Council Association of America
Investment Centers of America
First Data Corporation
National Association of Certified Valuation Analysts
Kelling, Northcross & Nobriga (municipal finance)
Lincoln Financial Group
De Lage Landen (international leasing)
Matrix Settlement and Clearance Services
National Association of Insurance and Financial Advisors
Strategic Planning Group
Thrivent Financial for Lutherans
National Association of State Retirement Advisors
2010 Midwinter Housing Finance Conference

Capitas Financial
ThinkEquity LLC
R.B. Wisner & Associates
Trigild (non-performing commercial loans)
TSYS (payment processing)
MCM (fringe benefits)
John Hancock
Society of Financial Service Professionals
Fiserv Investment Support Services
Questar Capital
UT Chapter of the Financial Planning Association
Towers Watson
Sedgwick Claims Management Services
Denver Security Traders Association
Mountain West Capital Networks
Utah Association of Public Treasurers
Tai Life Reinsurance Systems
FBL Financial Group
Barron's Magazine
Morgan Stanley Smith Barney
Community Associations Institute

Entertaining
and
Economist
in the same sentence?
YES!!

The presentation, *Economic Outlook for 2009*, was a perfect fit and very well received by our audience. Your timely and optimistic message was exactly what we were hoping for, and the positive feedback we received from meeting participants further proved that you were the right guy for the job.

Capitas Financial

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Many of our executives at the DaimlerChrysler Services Senior Management Meeting in Montreal made a point to catch me during the day and comment about how engaging and informative your presentation was. Your professionalism and ease with the very different situations you were in was outstanding.

DaimlerChrysler Services

Your presentation is content-rich enough to provide solid information that our producers could use in their practice. I also appreciated the preparation time you spent with us to make sure your message and our message complemented each other.

Symetra Financial



We've received nothing but glowing reviews on your session and many participants have asked us to be sure to invite you back to all future Forums. Of the 12 speakers we hired for this Forum, your presentation was rated most often as the "favorite" of the group.

ING Life Group

As the opening session for our conference, you provided exactly what we were looking for and the perfect start to our meeting. Your content was informative and entertaining.

Lincoln Financial Group