



# Financial Services Clients

## 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. Wiser & 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



**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

**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