

Mark Zinder — Program Topics

FINANCIAL SERVICES AUDIENCES

The Economy Today

› What Happens Next?

It appears that pessimism has permeated our society. After more than a decade of flat markets, declining housing prices, and—quite simply—bad news, it seems we have succumbed to this “new normal.” The credit crisis continues to loom large. Europe is in decline. Will Greece even survive? And to make sure that everyone is acutely aware of all the problems, cable news, talk radio, and newspapers give us constant updates on the dismal and declining state of the world.

What if they are all wrong?

Have we been blinded by it all? Are we extrapolating the present? Have we failed to peer around the corner and see that there is a new engine of growth in its very early stages? And it is accelerating! Is it possible that we have seen this all before but are so stymied by what lies behind us that we can't see what is growing in front of us?

The history books are full of examples of previous technology revolutions: the building of canals, the Industrial Revolution, the railroad revolution, electrification, mass production, and most recently, the information revolution.

Are we done...or, are we just beginning?

In this presentation you will learn:

- How history has indeed repeated itself, and how it will continue to do so in the future.
- How, with consistent regularity, the evolution of a new technology revolution unfolds, and how it has always unfolded in exactly the same manner.
- That we are in the early stages of the next technology revolution.

- How these technology revolutions have always completed their cycle in 45 to 60 years. (The microprocessor was invented in 1971, 41 years ago!)
- To acknowledge the past as a guidepost to the future, and use it to see the future before it becomes obvious to everyone else.

This high-energy and informative presentation is designed to help attendees see the world in a different, more positive way.

Practice Management

› **Righting Your Book: Doing Business the Way Your Clients Want Business Done**

The business of financial advice has changed continually over the last 30 years. When Mark passed his Series 7, the business cards read “stock broker.” Then came the titles “investment advisor” and “financial planner.” Today we are expected to be comprehensive wealth managers. But this isn’t just a name change on a business card; it’s a fundamental change in the way we run our business and market our services. Now that the recent financial crisis has created even more dramatic change in our market, more than ever we need to ask ourselves, “What changes am I making to change with it?”

Consider this: the average investor today does business with six to eight different financial professionals: he has a banker, a mortgage broker, a life insurance agent, and three or four different financial advisors. When he retires, he goes from working with six to eight, to one or two.

As the front edge of the baby boomers start to retire this year, the question is: will you be the advisor that the money is being transferred to—or one of those it will be transferred from?

This presentation is designed to teach you how to become the former. Areas covered include:

- Doing business the way your clients want business done
- Building a business, not just a “book”
- Refining a plan to get your clients’ financial house in order
- How to work more efficiently to maximize your day

› **The 6 Common Traits of the Most Successful Financial Advisors**

For over six years Mark Zinder was employed as the national spokesman for one of the most respected money managers in the world, Sir John Templeton. During this time Mark would be asked to speak on behalf of the Franklin Templeton funds at locations around the world. Quite often, these trips were designed to reward some of the top producers in the financial industry. After his speech, Mark would often speak individually and continue to correspond with these high level producers. The most often discussed topic was, "Out of all the financial advisors in the United States (roughly 600,000 of them) what is it that you do that makes you one of the best?" Over the years of interacting with these advisors and evaluating what makes them successful Mark has pinpointed the common traits of the most successful advisors in the country.

In this high energy, thought provoking presentation you will hear the insightful observations from Mark, who was in the trenches and learned from the people achieving the highest levels of success.

Areas covered include:

- How to talk so your clients will listen...and how to listen so your clients will talk
- How to see it before it becomes obvious
- How to get automatic referrals
- Where the roadblocks to success are and how to avoid them
- How to create a business plan that works vs. the one that is often created but never followed

For Client Events

› **Playing by the Numbers: A Lighthearted Look at a Serious Subject**

Client events are more important than ever. The recent economic downturn has changed how our clients think. In boom times they don't want or need much from us, often just a quarterly statement showing how much money they've made. Now that they've seen drastic reductions in their retirement accounts they have wisely become more educated about how and where they invest. Their investment IQ has gone up even though their account balance has not, and they seek more knowledge and advice from you than ever before.

Your client events need to both engage and educate, and Mark Zinder will give you the perfect balance of both. In this lively presentation, Mark will share stories that paint a picture of what to expect in the new economy going forward. This presentation is humorous and entertaining throughout, while at the same time providing your clients with historical perspective and an overview of where we are today. The end result, a memorable program that will help instill in your clients confidence in you and in their future.

NON-FINANCIAL INDUSTRY AUDIENCES

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