

Member Discount Quarterly Guide



***MEMBER
DISCOUNT
PROGRAM***



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*Guarantee Issue (no medical questions or exams) for 60 days for new FPA Members. All other members can apply subject medical underwriting

To learn more: login to OneFPA.org and find us in the Insurance area of MyDiscounts



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Letter from FPA

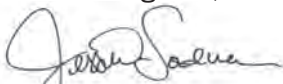
Dear Friends,

The Financial Planning Association® (FPA®) has cultivated a comprehensive collection of benefits aimed to support financial professionals and their businesses at every stage of their career. More than ever, members rely on FPA to provide guidance, education, networking and practice management resources that will help shape and grow them and their profession.

While the advisory landscape is constantly changing, FPA is making it easy for members to access a robust menu of programs, products and services that can propel members to new levels. By securing partnerships with industry-leading consultants, top-notch education providers, first-class insurance plans, and best-of-breed software and technology firms, FPA has unlocked hundreds of tools and resources at a fraction of the market price. This new printed guide will supplement one of our most valued member benefits, the *Journal of Financial Planning*, and will be released on a quarterly basis throughout 2015.

Be sure to log on to www.OneFPA.org for the most current list of Member Discount Partners. If you have any questions or feedback regarding partnerships for current or future consideration, please direct your inquiries to MemberServices@OneFPA.org, or contact FPA at 800-322-4237.

Warm Regards,



Jessica Sodman
FPA's Member Discount Program
Corporate Relations Team

8 x 8, Inc.

8x8, Inc. has become the industry's leading provider of unified communications and collaboration services in the cloud for small and medium businesses. FPA members receive discounted VoIP pricing as low as \$16.99/line for qualified accounts.

ADP Payroll Processing

Up to 25% discount off payroll processing for new or existing customers with the #1 payroll provider in the industry. Check out ADP's Workers' Compensation program offering members simple, cost effective and convenient solutions to fit the needs of small businesses.

Advantage Media Group

A boutique, author-centric publisher, working closely and collaboratively with authors from start to finish. The company's mission is to create the highest quality book, getting authors the precise results they are looking for. Advantage helps FPA members write, publish, monetize and market a book to attract their ideal client and grow their business as a result.

Advicent Solutions

Now the leading provider of SaaS technology solutions for the financial services industry. Products include financial planning, goals assessment and marketing communications tools. Thousands of financial professionals, including dozens of the world's largest financial institutions, use Advicent's solutions to help build their foundation for success. FPA members save 20% annually.

Advisor Impact

The Advisor Impact Client Audit helps financial advisers use client feedback to drive client engagement and uncover client-specific revenue and referral opportunities. FPA members save \$250-\$400 on Client Audit programs.

Advisor Websites

FPA members receive \$168/year lifelong discount on a website you'll love. Award-winning technology and exceptional, unlimited support set Advisor Websites apart. Members with a current website can also receive a free website report card.

Advisors Assistant

The leader in client management software for the financial services industry, Advisors Assistant increases sales, helps build relationships to retain clients, streamlines office efficiency and combines contact management (CRM), with optional portfolio and insurance management. Users can download investment transactions. Web-based or computer-based. Free support and updates. FPA members receive 15% discount.

Angie's List

More than 2 million households nationwide check Angie's List reviews to find the best local service providers, like roofers, plumbers, handymen, mechanics, doctors and dentists. They collect ratings and reviews on more than 720 different services. Members save 30% on subscriptions.

AnyMeeting

AnyMeeting is an easy-to-use web conferencing tool designed and priced for small businesses. Serving over 600,000 users including thousands

of financial service professionals, AnyMeeting meets all your web, video and phone conferencing needs in one simple tool — and starting at only \$16.20/month with your FPA discount.

ARAG

Chances are good that you'll face a legal issue in the coming year. Probably more than one. Now it's easy to get the professional legal services you need. Enroll to protect yourself from everyday and unexpected legal matters. Receive the low FPA group rate.

Banc of California

Since 1941, Banc of California has provided full-service banking and home lending to individuals and families. \$750 lender credit towards a residential, commercial, SBA or adviser acquisition loan for FPA members or clients of members.

BestBequest.com

A cloud-based digital safe deposit box. The BestBequest Protection Plan is only \$99.99/year for FPA members and clients.

Boston University Online Financial Planning Program

Boston University was one of the original schools to offer CFP® certification education programs and has over 30 years of experience in educating financial planners. This online CFP Board-registered curriculum provides 10% off a respected credential from Boston University, the rigorous academic foundation you need to advance your financial planning career, and excellent preparation for the CFP® exam.

BrightScope Advisor Pages

More than 350,000 investors do their due diligence on BrightScope each month when selecting their next financial adviser. Make sure your Advisor Pages profile highlights what sets you apart from your competitors. FPA members receive a 15% savings on Advisor Pages membership.

Budget

At Budget, you'll find the best deals and latest car rental coupons to meet your needs. If you're looking to get away for the weekend or just need a one-way rental, Budget offers a variety of great discounts when you rent a car. Save up to 25% on car and truck rentals.

Business AdvantEdge

Business AdvantEdge provides FPA members with volume discounts and other valuable benefits from key business suppliers such as ADP, HP, Staples, UPS, Grainger, ExxonMobil, and Sprint. Visit OneFPA.org for full program details.

CalSurance®

Errors and Omissions insurance coverage is a necessity for any professional in today's litigious society. CalSurance® has worked with FPA and A-rated carriers to offer registered investment advisers and life insurance agents a competitive Errors and Omissions insurance program.

Citrix ShareFile

ShareFile is a secure enterprise file sync and sharing service that meets the mobility and collaboration needs of users and the data security requirements of the enterprise. FPA members save 25% on an initial subscription.

CoffeeForLess.com

CoffeeForLess.com is the internet coffee shop for any home, office or restaurant and has established a solid reputation for being the preeminent coffee provider. CoffeeForLess.com carries more than just coffee, offering a variety of tea, energy drinks, office supplies and branded merchandise. Members save an additional 8% off already low prices and receive unlimited free shipping.

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What Does FPA Membership Mean to You?

Your membership in the Financial Planning Association® (FPA®) makes a powerful statement about you. It identifies you as a financial planner who is serious about your profession as well as purposeful about staying informed, educated and involved. FPA membership provides you with the benefits and resources you need to succeed.



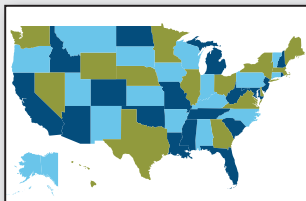
Valuable, Relevant Resources and Tools

Successful professionals rely on FPA for practice management tools and access to members-only resources and research reports. Browse OneFPA.org which is full of articles and resources on a variety of topics available to you 24/7.



Publications that Deliver Thought-Provoking Content

Membership includes the award-winning *Journal of Financial Planning*, digital editions of the Academy of Financial Services' *Financial Services Review*, a free subscription to *Bloomberg Businessweek*, *Money Magazine*, and FPA SmartBrief – a weekly digest of the latest news and trends in the profession.



Networking Within the Profession

Financial planners who take the time to meet and learn from their colleagues are better positioned to grow. FPA provides financial planners with a vibrant, active community of professionals who interact through local chapters, events, conferences, virtually through FPA Connect, our online compliance-friendly discussion forums, and FPA Knowledge Circles.



Cutting-edge Training and Development

For financial planners, professional development isn't an option, it's an ongoing necessity. FPA offers more ways to increase your skillset and earn Continuing Education credit by offering diverse educational opportunities throughout the year.



Foundational and Advanced Financial Planning Knowledge

Learn from seasoned professionals as they cover today's most relevant challenges and trends through FPA's live and on-demand webinars, available when most convenient for you with just a click.

Not an FPA Member? Join Today by Visiting OneFPA.org or call 800.322.4237 x2

College for Financial Planning

The College for Financial Planning has over 40 years of experience, 140,000 graduates, and a history of successful alumni who have increased both their earnings and their number of clients. Become one of the nation's top financial advisers. FPA members save 15% on professional education programs and courses, and may be eligible for several scholarships.

Cruises Only

Travel broadens our horizons and helps bring us closer to our friends, our families, and loved ones. The memories that result from vacationing sustain us throughout our hectic, fast-paced lives. This is what inspires us to serve you, each and every day. Receive a 110% price guarantee.

Dalton Education

Dalton Education, LLC is a leading provider of innovative education solutions in financial planning. The founders of Dalton Education have helped thousands of financial professionals earn the CFP® certification marks. Our program consists of providing the highest quality CFP® education through premier university partners and the leading CFP® review course in the industry, THE DALTON REVIEW® for the CFP® Certification Examination. Enjoy FPA scholarships, savings on education programs including a social media management courses and more!

EarthLink Business

A leading IT, data, voice and internet services provider to more than 150,000 businesses and one million consumers nationwide and offers

"I've subscribed to our association's disability insurance plan through Ryan Insurance since its inception. The coverage for the price is a good value, especially if you're self-employed. With guaranteed issue and easy online enrollment, I think this is one of the best benefits offered by FPA."

– Jeff Tomaneng, CFP®, CDFATM, CRC®
Waltham, MA

services including: phone lines, IP PBX, VoIP, SIP trunking & PRI, DSL, T1, ethernet, fiber optic and MPLS, cloud hosting, virtual desktop, help desk, data back up, and disaster recovery. Members receive up to 3 free months of service each year.

Emarketeer.com

A marketing automation platform that includes email, SMS, web, Facebook and mobile landing pages, forms and surveys, all automated and integrated with CRM and social sites with pre built campaigns for financial planners.

eMoney Advisor

The leading wealth-planning system for financial advisers, eMoney is more than just wealth management software – it's a better way of doing business. Tailored to transform an adviser's ability to deliver expertise, eMoney is the silent partner of more than 20,000 of the industry's top financial professionals. FPA members receive a free 14 day trial.

ETF Global®

ETF Global® is a leading provider of data, research, investment decision support applications, proprietary risk analytics and educational offerings for exchange-traded products. The ETFG research platform supports the overall investment process with a variety of strategies and applications

to pursue return, manage risk, utilize investment analysis and generate investment ideas.

Expedia

See National Purchasing Partners on page 7.

ExxonMobil

ExxonMobil Fleet card program benefits include: Save up to 6 cents/gallon; Lower the amount of fuel used each month; Get real time alerts when drivers spend outside your company policies; Know which vehicles need service to optimize fuel MPG; Reduce accounting and administrative time; Manage your account online.

FedEx

Did you know FPA members get special discounts on both international and U.S. shipping? Enroll in the FedEx Advantage® program today and start saving 15-21% on FedEx shipping and business services. Visit OneFPA.org to access the FPA-FedEx password.

FiPath4Advisors

Online marketing made easy. We work with advisers and firms to leverage modern strategies, tools, and technology that bring targeted clients to you, that are easy to use, and that generate attractive ROI. We educate, then automate. We offer consulting and coaching services through our principals and best in class partners. FPA members receive 20% off featured services.

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We help advisers work more efficiently and grow your revenues by standardizing and systematizing your firm. FFPN specializes in helping you integrate all the critical components of your business including systems and operations, technology, practice management and human capital.

We provide the training, workflows, tools and resources to accomplish this.

Fox Financial Planning Network is a **2015 FPA Business Success Partner**. Deborah Fox was featured in FPA's *Journal of Financial Planning* in January 2015. Their firm has partnered with FPA to provide essential practice management content and education to our advisers. Learn more at OneFPA.org.

CONTACT

Info@FoxFinancialPlanningNetwork.com

FP Transitions

FP Transitions specializes in the valuation and analysis of the intangibles that make a financial services practice unique, and valuable. FP Transitions' consultants guide owners and advisers in planning for the inevitable end of their careers, turning this into a positive event. We employ strategies and thinking that build upon a lifetime of work and trusting client relationships with a plan of succession designed to simultaneously realize value for the founder and perpetuate the business for the next generation of advisers. FPA members receive special offers on valuations and more.

FPA Health Insurance Marketplace

The FPA Health Insurance Marketplace provides multi-level health benefits solutions for members and their families in all 50 states. Our licensed benefit counselors provide each member with a live needs analysis to identify the perfect coverage based on needs and budget. In one phone call, you now have the ability to shop, compare and enroll in BOTH government exchange and private health insurance plans!

FunJet

With more than 900 destinations in Mexico, Hawaii, the Caribbean, Europe, Asia, and the U.S. as well as more airlines and thousands of more hotels to choose from your trip will be more enjoyable with FunJet planning it. With your exclusive FPA 5% member discount and "Price Match Plus" you're guaranteed to have the most cost efficient trip, or we'll match it! All-in-One Travel Protection allows you to change or cancel your reservation, with no fees, and full monetary return.

Grainger Facility, Maintenance

Facility, maintenance, and operations products up to 24% off catalog pricing on select products with FREE standard shipping. Hundreds of items with additional discounts including seasonal items and commonly purchased office and break room supplies.

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HP offers you an incredible array of business grade equipment with special association pricing including: full size and mini- notebooks, laptops, docking stations, monitors; tablets; desktops and work stations; scanners, printers,

accessories plus FREE SHIPPING! Discount levels vary based on product. Rotating monthly promos offer up even greater savings.

In-a-Bind

FPA rates on custom binders and more.



Kaplan is a leading global provider of financial education solutions and has everything you need to achieve your goals through a variety of convenient, interactive learning options. Save 15% on your Insurance Prelicensing and Continuing Education, Securities Licensing, Firm Element, CFA® exam prep, or CFP® exam study programs.

Keir Educational Resources

Keir provides the best exam preparation for FINRA licenses, financial designations or certifications such as CFP® certification. Our goal is to get you through your exams quickly and efficiently, helping you grow your career without disrupting it. FPA Members receive a 20% discount. Ask about FPA scholarships.

Legal Zoom

See National Purchasing Partners on page 7.

Lenovo

FPA members are eligible to receive discounts of up to 20% off the every-day public web price on a wide range of Lenovo products, including laptops, tablets, desktops, accessories and more! In addition, you can receive free ground shipping on all web orders and monthly limited time special offers.

FPA's ANNUAL CONFERENCE –

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2015 Keynote Speaker Announced

Motivational speaker and gold medalist, Jim Craig, has joined FPA's Annual Conference – BE Boston 2015 keynote speaker lineup. Craig is widely known as the heart and soul of the 1980 USA Olympic Hockey team. As goaltender for the US “miracle” hockey team Craig and his team accomplished the unthinkable – winning a gold medal in ice hockey. Join Craig as he provides strategic insight to improve the outcome and performance of your organization.

“Don't be intimidated by the impossible, be motivated by the possible.”

Jim Craig, 1980 USA Olympic Hockey team gold medalist



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Online registration is now open!
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The FPA logo consists of the letters 'FPA' in a bold, sans-serif font, with a stylized horizontal line extending from the 'A'.

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Elissa Buie, CFP®



Jonathan Guyton, CFP®



Kyra Morris, CFP®

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Liberty Publishing

Continuously reaching out to clients, prospects, and centers of influence is an essential practice that every financial professional should be implementing. Our newsletters, brochures, and other marketing tools make your communications job a whole lot easier. Members receive reduced pricing and complimentary company branding.

Lightbulb Press

Lightbulb Press creates easy-to-understand customized financial booklets and articles and financial literacy websites that help financial professionals educate their clients and employees, market their services, and build their brand. FPA members save 15% and may receive free shipping promotions.



Offers minimum 5% discount on E&O Insurance for RIAs and financial planners. For over 25 years, Markel has established a strong reputation as a result of its industry expertise, stable premiums, and excellent claims management services. Specializing in policy customization and risk mitigation strategies. New optional coverage for cyber liability available.

MetLife

FPA has partnered with several divisions of MetLife to provide FPA members with discounted and comprehensive access to the services they need. From auto and home insurance, to a prescription discount program, to online risk management services, we've got you covered. Receive FPA group rates on auto and home, a free prescription discount program and 15% off MetLife Defender.

MetLife Defender provides comprehensive protection against the full range of today's online risks — beyond your personal computer or device — to keep your personal data safe. Receive FPA pricing on both individual and family plans.

Modestspark

Modestspark is focused on providing registered investment advisers with the ultimate client experience. Their app is built and designed to help you and your clients see and understand their portfolios. They leverage your existing portfolio accounting system for quick set up and simple maintenance. Generate dynamic, rich client reports that are easy to understand, simplify the client review process and focus on the story behind the numbers and reinforce your hard work with a fully integrated social experience. Members receive one month free.

Money Tree Software

Our customers value the accuracy and control they get with Easy Money Power Planner, the detailed cash flow reporting

with tax implications and sources of funds from Golden Years Cash Flow, and the ease with which they can do planning scenarios and "What If" plans with Silver Financial Planner. All FPA members receive a 20% discount.



MGP's unique ability is to make sophisticated, goal-based planning fast and easy. We believe every investor needs and deserves a high-quality financial plan and that every adviser should have the means to provide it. Because MGP is smart, easy-to-use and adaptable, you can now provide a profitable planning experience for every client. For college, retirement, estate and Social Security planning, asset allocation and insurance needs analysis, tech integration and account aggregation. Receive flat FPA pricing of \$995/year.

National Purchasing Partners

National Purchasing Partners is a nationwide Group Purchasing Organization (GPO) with multiple contracts to help companies reduce their cost and improve their margin. As an FPA member you can now access cost savings with companies such as Verizon, Expedia, Staples and Level 3 through NPP.

National Car Rental

National Car Rental is a premium brand for business travelers with locations in major airports throughout North America. Members receive 20% off car rentals and unlimited mileage.

Ned Davis Research

Investment professionals throughout the world depend on Ned Davis Research for our balanced strategic insights and actionable ideas. Our award winning 360° approach assists clients by offering strategic insights, historical context, and actionable ideas. Clients value the strategic benefits resulting from the breadth, depth, and quality of NDR's data and research.

NerdWallet

NerdWallet's Ask an Advisor platform provides FPA members with an opportunity to easily expand their online presence by demonstrating their expertise on the needs of their target clients. Adviser content is distributed to NerdWallet's over 2.5 million monthly users and featured in national publications ranging from *USA Today* to the *WSJ*.

2015 FPA BUSINESS SUCCESS PARTNER



Pathfinder Strategic Solutions is an independent consulting and coaching firm based in Knoxville and New York. We are dedicated to helping financial planners and advisers manage and grow strong businesses by starting with a clearly defined objective and a strategic plan to achieve it. Our team's carefully developed programs and services offer expertise to firms supporting and wishing to attract and retain high-quality advisers and staff.

Pathfinder Strategic Solutions is a **2015 FPA Business Success Partner**. They have partnered with FPA to provide essential practice management content and education to our advisers. Learn more at OneFPA.org.

CONTACT

Info@PathfinderStrategicSolutions.com

2015 FPA BUSINESS SUCCESS PARTNER



Based in Omaha, Nebraska, Peak Advisor Alliance is the country's largest financial adviser coaching and resources program with more than 1,000 members who collectively advise over \$100 billion in assets. Based on the experience of \$12 million, 21-time #1 producer, Ron Carson, Peak Advisor Alliance helps financial advisers build more profitable businesses, provide better client service, and live a principled and fulfilled life. Peak Advisor Alliance members receive one-on-one and group coaching support, various resources, strategies, systems, and tools, and an unparalleled peer network.

Peak Advisor Alliance is a **2015 FPA Business Success Partner**. They have partnered with FPA to provide essential practice management content and education to our advisers. Members also receive a \$250 discount. Learn more at OneFPA.org.

CONTACT

800-514-9116

PlanPlus

With PlanPlus Planit, individual advisers and firms have a broad selection of tools that give them what they need to accurately and efficiently answer their clients' most pressing questions. FPA members save 20% on PlanPlus Planit financial planning tools.

Plum Benefits

Bigger, better... and serious about fun! Now you have access to the leading travel and entertainment corporate benefits program in the world, Plum Benefits powered by TicketsatWork. FPA members can save up to 60% on over 80,000 Broadway shows, theme parks, movies, sports events and attractions and hotels.

Protected Tomorrows

Protected Tomorrows is an advocacy firm that enhances the lives of people with special needs by providing training programs to professionals who work with families with disabilities. Protected Tomorrows helps financial professionals manage business risks, grow their practice and deepen relationships with clients who have a loved one with disabilities.

Red Roof Inn

Red Roof Inn has over 350 hotels across 41 states in the U.S. Take advantage of accommodations like free Wi-Fi, HBO, ESPN, CNN, and pets stay free! You will find great rooms, comfy beds, budget-conscious rates, and nice people devoted to making your stay a great one. Members save 15% on all bookings.

RIA Match

For succession planning growth and NextGen recruiting. Search for free, pay to connect anonymously! Buy, sell, merge, join, add. Receive one free month plus 20% off either monthly plan. More than 1,600 subscribers from 45 states have sent over 13,000 messages. 80% of paying subscribers in dialogue.

RightSignature

RightSignature is the simplest, most efficient way to get your documents signed. RightSignature enables you to streamline your client onboarding process, reduce

paper and ink expenses, avoid fax hassles, cut document return time from weeks to hours, and provide a superior client experience. Members save 20% on e-sign packages.

Riskalyze

Riskalyze is transforming the advisory industry by empowering investment advisers to capture a quantitative measurement of client risk tolerance, and use that data to win new clients, capture and meet expectations and quantify suitability. With just a click, transform your existing website into a lead generation machine. Empower prospects to hand you all the intel you need to close them as new clients, quickly and easily. FPA members receive a flat rate of \$99 per month pricing.



RYAN INSURANCE STRATEGY CONSULTANTS

Licensed to do business in all 50 states, Ryan Insurance Strategy Consultants is an independent insurance brokerage firm specializing in life, disability and long-term care insurance policy analysis for financial advisers and their clients. We are also a disability plan administrator for several large financial services associations. Ryan Insurance Strategy Consultants works exclusively with financial advisers to help them analyze insurance needs.

FPA members have access to the best group voluntary long-term disability coverage in the industry, as well as an excellent term life program. Contact Ava Chappell to learn more about these FPA insurance programs.

CONTACT
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"I called [MoneyGuidePro] today and, very graciously, they looked up my record and saw that I was a long-time user of their service. They applied the FPA rate to my account and extended my current subscription a couple of months to help make up for me not getting the discount previously. Another nice benefit of belonging to FPA."

– Bob Rall, CFP®
Merritt Island, FL

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FPA members have access to this premium client service and practice management model that aims to transform your practice and impress your clients. “We put clients in motion.” This neuroeconomic-based client service model focuses on proven practices that will improve your financial success as an adviser, and help your clients make smarter financial decisions. Members receive flat FPA pricing of \$200/mo. the first year, and \$149/mo. thereafter.

Sprint Wireless Services

19% discount on qualified rate plans; 25% off select Sprint accessories; 28% off 3G/4G data solution plans for connections cards, mi-fi, and hot spot devices. Please note that this program is for NEW SPRINT SUBSCRIBERS ONLY and does not apply to existing Sprint account plans.

Staples

Member discounts up to 70% off office, breakroom and tech products, 12% minimum discount on standard items, exclusive pricing on copy and print, and customized promotional items, plus FREE shipping.

SunGard

SunGard’s solutions help advisers create agile growth through innovative technologies, efficiency and enhanced service. The comprehensive suite includes award-winning solutions WealthStation Financial Planning and AllocationMaster, and innovative tools like CompAct, which allows advisers to quickly create actionable financial

plans that help simplify complex information and make it more meaningful to the client. FPA members receive a 30 day free trial and 20% off WealthStation access.

UPS

Up to 28% off shipping services, including Next Day Air® and Worldwide Express Export. Up to 21% off 2nd Day Air®, and up to 5% off UPS Standard to Canada, and 10% off UPS International Import.

Verizon

See National Purchasing Partners on page 7.

Willis Private Client

Willis Private Client, a leading global insurance broker, will be offering FPA members access to superior personal liability protection against high-stakes lawsuits at a reduced price — all through a group umbrella liability insurance program from ACE Private Risk Services. In addition to addressing your need for liability coverage to protect your net worth, we can also offer advice about your need for home, auto, valuable collections, and watercraft insurance so that you have a comprehensive personal insurance program that helps keep your family safe, life simple, and assets secure. FPA members have access to the group rate program.

Wine Country Gift Baskets

Save 10% on all orders plus free personalized ribbon.

Wyngspan

FPA has partnered with Wyngspan to showcase the most trusted financial professionals in our industry. Search for and claim your business or professional listing, then use your promo code on the “Build my Trust Factor” tab and receive 30% off the premium service, which allows you to quickly invite your clients to “Trust” you. Members can claim their profile for free in minutes.

Your Office Agent

Your Office Agent is an innovative corporate real estate and workplace consultancy. We provide business people with expert advice and management of their leased offices and workplaces. Be it for one office location, a portfolio of offices worldwide, or virtual, part-time, on-demand, or mobile officing options, Your Office Agent works to match you with the best workplace solutions for your needs today, while anticipating and planning for your changing needs in the future.

**Be sure to check
back throughout
the year for updated
discount information
in the following
*Journal of Financial
Planning* issues:**

May 2015
August 2015
November 2015

Visit OneFPA.org

Current as of December 31, 2014

How a Financial Advisor Created Exclusive Authority to Build an Extraordinary Business

Matt Zagula

Coach of Elite Financial Advisors

Books:

Invasion of the Money Snatchers, Don't Fumble Your Retirement and Creating Trust

Results After Publishing:

- increased referrals
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- seven-figure annualized business
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- co-authorships with celebrities

magnetically attract **PERFECT CLIENTS**



Matt Zagula is not your ordinary financial advisor. Licensed in all 50 states, Matt maintains a full personal practice. He is also a master coach to elite financial advisors and attorneys across

the country. More importantly, Matt has achieved financial freedom, and now works only with people and projects he enjoys. Clearly, Matt built a dream business – on his terms. So, how did he do it?

Matt is an author and he uses books to attract clients and close sales. In fact, books have provided so much value for his business; he has authored or co-authored several including *Invasion of the Money Snatchers, Don't Fumble Your Retirement* with Rocky Bleier, and *Creating Trust* with Dan Kennedy. Matt describes a book as “the power deliverable in the creation of authority.”

Enhance Any and All Marketing Strategies You Use With a Book

Being an author positions you with authority, celebrity, and exclusivity, or ACE, as Matt calls it. When you write a book that resonates with your belief system, you attract people who agree with your world-view, “Instead of trying to convince people about what you’re

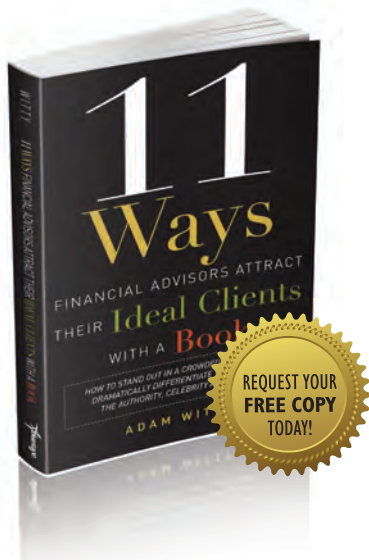
good at, they already believe it.”

Matt uses his books “everywhere” to market his business. He sends books in the mail, offers listeners books during radio interviews, and promotes books on social media. He also hosts “evenings with the author” instead of the traditional financial seminars. In anything he does, books make a lasting impression with potential clients because, as he says, “people don’t throw books away.”

While his books attract new clients to his firm, referrals from these clients provide “astronomical” returns. Matt simply gives each new client two books along with *A Consumer's Guide to Finding the Right Advice Giver*. He will then say, “If you have friends, family, or neighbors with financial issues, just hand them a book and our guide and tell them, ‘These are the people we like and trust.’”

Create A Dream Business While Defining Your Own Terms

When you write your book with a purpose in mind, Matt says, “You can drive revenue, drive productivity, and be successful by communicating your message.” Whatever your purpose may be, you can generate leads at a level that suits you and your business.



Ready to take your financial practice to the next level and solidify your position as an expert? Request a complimentary copy of *11 Ways Financial Advisors Attract Their Ideal Clients With a Book* to read Matt’s complete story and the success stories of 10 other financial professionals, just like you.

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