

**Special Reminder**

## **The Cannon Estate Planning Teleconference Series**

*featuring*



Roy M. Adams, Esq.

For details  
review the  
Teleconference  
Brochure  
or visit

[www.cannonfinancial.com](http://www.cannonfinancial.com)  
and click on  
Distance Learning,  
Teleconferences,  
Roy Adams Teleconference



*Take Advantage  
of a  
Powerful and Proven  
Center of Influence  
Marketing Strategy*



# *Why Are Attorneys and CPAs Loyal To Certain Advisors and Financial Institutions?*

Pundits have said for years that it is all about the money...yet experience shows that's not the real story! It is about relationships.

"The Cannon teleconferences have been a great way to strengthen our relationships with attorneys and our office averages approximately 20 teleconference participants each month."

**Wealth Management Advisor,  
North Carolina**

Attorneys and CPAs desire to work with advisors and financial institutions where they have relationships and know the people they trust with their clients. They look for financial professionals who are collegial, motivated, and who like to stay at the forefront of knowledge. They also like professionals who understand the principle of reciprocity – a mutual exchange of privileges. In essence, one who gives is more likely to receive!

During the past eight years, thousands of attorneys and CPAs have gathered monthly with their favored banks, trust companies and investment advisory firms to gain hands-on, practical knowledge and insight into the planning, latest techniques and tax rulings impacting wealthy clients and their families.

For less than the cost of a round of golf for you and two professional referral sources, and for much less than the cost of a full page ad in most monthly journals, you can be face to face each month with ten to 20 key professional estate planning advisors who will become loyal to you and your institution when you have them as guests in your office for the Cannon Estate Planning Teleconference Series with Roy Adams.

## *Why Not Take Advantage of a Powerful and Proven Center of Influence Marketing Strategy in Your Office?*

This is an easy and effective way to simultaneously turn obtaining critical educational information for your own professional development and leverage that into a new business tool!

"These teleconferences have been an effective tool for us in networking with prominent estate planning professionals in our market area. We routinely have 8-12 professionals come to our office each month to listen to the teleconferences with Roy Adams."

**Trust Professional,  
New Jersey**

# CENTER OF INFLUENCE MARKETING INITIATIVE FOR YOUR TRUST AND WEALTH MANAGEMENT OFFICES

If you have been to a Cannon school or in-house session, you have heard us say that the trust and wealth management industry is based on great relationships with other professionals. Cannon is offering you a way to maximize your opportunities for cultivating relationships with local attorneys and CPAs for very little time and money using The Cannon Estate Planning Teleconference Series with Roy M. Adams.

This partnership with Cannon offers you the chance each month to host local attorneys, CPAs, CFP®s and other centers of influence (COI) or business referral sources for the Cannon Estate Planning Teleconference Series. With little planning and effort, you can host these monthly programs in your office and will see a tremendous growth in the depth and breath of the professional relationships you have with COIs.

## Here Is How It Works

You invite attorneys, CPAs, CFP®s and other potential business referral sources to your office or to a private room at a restaurant or club to listen to the monthly programs with you and your staff. Since the call is around the lunch hour, consider also offering lunch to your guests. The Cannon teleconference charge is a per phone connection fee, and not a per guest or per head fee, so you can invite a number of guests and have an excellent business development program for a small price per guest.

## What You Get and What You Give

The teleconference offers each guest free materials they can use for future reference, free Continuing Education credits for CPAs, CFP®s and attorneys in most states, and useful information they can use with their clients from the best names in the business (Cannon and Roy Adams). In return, you will position your professional expertise and interests as aligned with these professional advocates of wealthy clients. More importantly, you will have an opportunity to explore the topic and identify clients who may need your help addressing the issues presented, not to mention earning the loyalty of these important COIs. As an added benefit, your staff will get continuing education credit, too. This is a win-win for all!

## What It Costs

A cost/benefit analysis shows that it is a can't lose investment of time and money for your office. The programs last just 1.5 hours and cost only \$295 per month. In addition, multiple site discounts are available for institutions and firms who have more than one office site each month. To learn more about the multiple site discounts, call Milton Eisenberg or Lisa Dunlavy at Cannon at (706) 353-3346.

## How To Order

The following is a "How To" guide on hosting the programs. This is an inexpensive auto-pilot center of influence marketing initiative to help build your pipeline to capture great new affluent and high net worth clients. Call 1-800-775-7654 now and order the Teleconference Series. Be sure to share with the operator the name of your firm to take advantage of special negotiated rates.



# STEP-BY-STEP GUIDE FOR THE CANNON TELECONFERENCE SERIES

## Step I

Contact KRM Information Services at 1-800-775-7654 to sign up your office for the Cannon Teleconference Series or register at [www.cannonfinancial.com/teleconf.htm](http://www.cannonfinancial.com/teleconf.htm).

## Step II

Identify the twenty-five to thirty most influential attorneys and CPAs in your local market area who have an estate planning practice and who you would like to get to know better. These professionals should be a good source of potential business.

## Step III

Send a personalized invitation (hand-addressed) to the professionals to join you for a monthly “lunch and learn” estate planning program on cutting-edge topics and issues led by Roy Adams, one of the most knowledgeable estate planning attorneys in the country. Be sure to note that lunch will be served and that continuing education credits will be available. (CE is available for CPAs, CFP®s, CTFAs and attorneys in most states).

## Step IV

Contact a caterer to plan a menu or have arrangements made for box lunches to be brought in.

## Step V

Personally phone each professional within 72 hours of sending the invitation to “confirm their attendance,” not to “see if they

*(continued on back)*

will be attending.” You want to be sure they understand that they will be getting a free lunch, free CE credits, a set of materials they will want to keep for reference and valuable cutting edge information on par with what they would receive if they paid top dollar to go to a national estate planning conference. This is information they can immediately use with their clients when they get back to their office.

## Step VI

Prepare a directory on each attendee...who they are and their practice specialty.

## Step VII

Host the luncheon and teleconference. Serve the lunch approximately 20 minutes before the teleconference begins and while the guests are eating give short five minute talk on a topic such as how you effectively serve clients in a particular area and how you can help them with their clients. This is a soft sell opportunity. Thank them for coming. Let your office staff use the time to get to know the guests on a first name basis.

## Step VIII

At the end of the teleconference when the guests have left, gather your staff for a ten minute debrief, and come up with list of action items and follow-ups.

## Step IX

Write personal thank-you letters to the professionals who attended thanking them for coming and informing them of the next program in the Series with date and time and inviting them to come.

## Step X

Follow-up with phone calls requesting appointments to meet with professionals.