

Cannon Schools

Invest in Yourself
Invest in Your People
Invest in the Power of Learning™

What's Inside

- *Growing Your Business for Wealth Advisors I*
- *CWS® Certified Wealth Strategist® Certification*
- *Private Wealth Sales*
- *Wealth Management for Private Bankers I, II*

“A great course with many takeaways! I will certainly be back for more instruction. Donna is great.”

- Hugh Virich
Vanguard

Sales, Relationship & Practice Management Schools



Sales, Relationship & Practice M

Why Cannon?

Cannon Financial Institute is the nation's acknowledged leader in consulting, training and coaching for providers of wealth and investment management, trust, private banking, brokerage, insurance and retirement plan services. Our trainers consistently earn outstanding marks for their industry-specific expertise, communication ability, and the use of innovative and practical approaches. These qualities produce training and consulting projects that are focused, relevant and strategically invaluable. But don't just take our word for it. Find out for yourself and join the thousands of distinguished graduates who have been trained by Cannon for over 40 years. **Satisfaction is Guaranteed!**



GROWING YOUR BUSINESS FOR WEALTH ADVISORS I

Cannon presents Wealth Advisors with a systematic approach to retaining and expanding client relationships, and attracting new affluent and high net worth clients more successfully than ever before.

Our manageable framework integrates industry best practices in:

- Developing Your "Client Experience"
- Creating Your Branding Message
- Working with Market Niches
- Client Interviewing and Presentation Skills
- Increasing Your Closing Ratio to 90% with Bringing in New Clients

In addition to growing your family wealth advisory practice, participants will gain practical knowledge in key technical financial concepts relevant to wealthy clients. By combining a dynamic framework for attracting and working with clients with the application of comprehensive wealth management solutions, advisors will propel their business to new levels of success.

Who Should Attend

- Wealth Advisors
- Brokers
- Financial Planners
- Trust Officers
- Insurance Professionals
- Financial Services Salespeople
- Managers of Wealth Management Units of Banks, Brokerage, Firms, and Insurance Companies

Key Benefits

- Participants will develop the skills and knowledge to create an action plan to dramatically grow their business.
- Participants will increase their knowledge of key wealth management issues and their ability to apply these concepts to comprehensively address their clients' financial needs.
- Participants will be given specific scripts and talking points to assist them in speaking credibly with their clients.
- Participants will be given forms and tools that will enable them to effectively manage, grow, protect, and preserve their clients' assets.
- **Courses count for the required classroom study hours leading to the CWS® designation.**

CWS® CERTIFIED WEALTH STRATEGIST® CERTIFICATION

The Certified Wealth Strategist® designation provides the knowledge, the practice management formula, and the critical client interaction skills to create and build a dynamic Wealth Advisory practice that works effectively with complex client issues.

This highly acclaimed program is one of the fastest growing certifications in our industry, because it is about both knowledge and application – it is about YOUR goal to become your clients' **trusted advisor**.

Based on Cannon's signature approach to wealth management, the program utilizes blended learning that includes instructor led training, online eLearning modules and mastery exams, assigned readings with case studies, and a Capstone Project where you develop a business framework to apply new skills to your practice.

The CWS® is designed for financial services professionals and institutions:

- Moving away from transaction-based business to consultative, comprehensive business and client service model
- Holding other professional designations and seeking the "know-how" to realistically put their knowledge to use immediately
- Who have a strong functional expertise in one of more product lines (such as investments or insurance) and want to round out their ability to serve clients comprehensively

Who Should Attend

- Financial Advisors
- Private Bankers
- Insurance Agents
- Full Service Brokers
- Registered Investment Advisors
- Independent Financial Planners
- Attorneys
- Certified Public Accountants

Key Benefits

- Organizes your practice
- Maximizes relationships
- Differentiates you from other financial services professionals
- Academic and practical
- Insulates your clients from competitors by insuring you extend the highest level of wealth management
- Client communication skills that are proven to work with the high net worth market
- Financial services professional's that take the CWS® meet and exceed the competitive and evolving environment of the financial services industry

For more information visit:
www.certifiedwealthstrategist.com
or call 706-353-3346



Management Schools

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PRIVATE WEALTH SALES

At Cannon, we recognize the special skills required of those charged with investment services and trust sales responsibilities. In our forty years of practical financial services training, we've developed the ideal school to help you target the profitable trust and investment prospect and turn that prospect into a client.

This class is conducted by dynamic professionals; and participants not only receive very practical and productive ideas on prospecting, interviewing, presentations and closing sales, but also will have the opportunity to practice and improve these skills. Each person in the class takes with them an action plan utilizing ideas received in class.

Who Should Attend

- Investment Sales Officers
- Financial Consultants/Advisors
- Trust New Business Officers
- Trust Sales Managers
- Trust Department Managers
- Personal Trust Administrative Officers with new business responsibilities
- Private Bankers with investment management/trust business development responsibilities
- Other Personnel with investment management/trust business development responsibilities

Key Benefits

- Participants leave with the dynamic initiatives of:
 - A personal prospecting plan for their market
 - A conversion plan for moving their prospects to clients
 - Top-line industry knowledge source guidance
- Establishment of a network for sharing ideas and contacts for selling trust and investment management services
- Exposure to different selling techniques and the sales cultures of other financial institutions

WEALTH MANAGEMENT FOR PRIVATE BANKERS I & II

At Cannon, we recognize the special requirements of broad financial services knowledge and relationship management skills for those individuals charged with responsibilities in Wealth Management/Private Banking. Drawing on over forty years experience of practical financial training, we have designed the ideal two-course program encompassing the latest developments in Wealth Management for Private Bankers, which will benefit experienced Wealth Managers as well as those who are new to this emerging growth area of the financial services industry.

Who Should Attend

- Private Banking/Wealth Management Officers
- Private Banking/Wealth Management Managers
- Senior Personal Trust, Retail or Commercial Banking Managers
- Fulltime Sales Officers

Key Benefits

- Participants leave with top-line and timely wealth management knowledge and information, enhanced business development skills and a personalized 15-day action plan for immediate use upon returning to their institutions
- Participants become part of a network of individuals and faculty with private banking responsibilities that will benefit them for years to come
- The latest marketplace developments in wealth management/private banking from service to organizational structure and delivery will be covered and discussed in a format which will enable the student to apply this new information to his or her environment

Class Schedules

GROWING YOUR BUSINESS FOR WEALTH ADVISORS I

Registration will take place on Sunday afternoon. Working sessions begin on Monday at 8:00 AM. The two-day session closes on Tuesday at 5 PM. Attendance at each session is mandatory.

PRIVATE WEALTH SALES

Registration and orientation take place on Sunday afternoon and class begins on Monday at 8:00 AM. The one-week session closes on Friday at 3:00 PM. Attendance is mandatory at all sessions.

WEALTH MANAGEMENT FOR PRIVATE BANKERS I & II

Registration and orientation take place on Sunday afternoon and class begins on Monday at 8:00 AM. Both I & II are one-week sessions that close on Friday at 3:00 PM. Attendance is mandatory at all sessions.



Cannon Financial Institute is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE sponsors.

State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417 or by visiting the web site: www.nasba.org.

For information regarding, learning objectives, program level, amount of recommended CPE credits or our refund/cancellation and complaint resolution policy please visit www.cpe-market.com.



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EVENTS YOU CANNOT
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For information or to register go to
www.cannonfinancial.com

