

**Expert Business Coach,
Values & Behaviors
Analyst and Expert
Professional Speaker**

Simon Reilly

**Simon's Dynamic Presentation on
"Removing Your Roadblocks" will add value to your next
Association, Conference, Sales or Study Group Meeting.**

Removing Your Roadblocks to Your Success

A recent survey revealed the following statistics:

- 33% have no Vision or Business Plan
- 23% over 63 years of age have no Succession Plan
- 33% earn \$50k - \$100K per year
- 12% are Very Satisfied
- 49% Not Very Satisfied
- 40% are NOT Satisfied

In a world where we believe that, "money buys you happiness", therefore working in the financial services industry would equally make you happy, one has to ask "WHY" these survey results are happening.

This presentation will help you to understand WHY you may have the Roadblocks and HOW to Remove Your Roadblocks to YOUR Income, Vision & Business Planning, Time Management, Delegation, Referrals, High Net Worth Clients, Product Specialization, Niche Marketing, Client Segmentation and More.

Simon's experience has been developed through years of work with the following industry leaders:

Frank Allen – The Frank Allen Financial Group Inc.
Nelson Deslippe – Integral Financial Services Inc.
Diane Dupuis – Dupuis Langen Financial Management
Philip (Phil) Hauser – Sterling Mutual Funds Inc.
Edna Keep – Assante Financial
Paul Lauzon – Lauzon Financial Advisors Inc.
Andy Leitch – Canaccord Capital
Grant McPhail – Rice Financial Group
Duncan Robinson – Freedom 55 Financial
Rod Tyler – Tyler & Associates
Tracy Valgardsson Enns – Partners in Planning

His speaking is well received at Advocis Education Days, Private Company Events, Pro-Seminars and The Independent Financial Brokers Association. Simon has been featured on the BCTV News on Global, has been published in The Advocis FORUM Magazine, and noted in Canadian Business, Profit Magazine, The Globe & Mail, The Vancouver Sun and The Province.

Please call either Laura or Simon and we can help to answer any of your questions.

Leading Advisor, Inc.
300 – 1055 West Hastings St.
Vancouver, BC
Canada V6E 2E9

Tel: (250) 248-6012
1 (877) 248-6012
Fax: (866) 902-4066

E-Mail:
sreilly@leadingadvisor.com
or
ireilly@leadingadvisor.com

"Sincerity, humor, enthusiasm – genuine concern about the succession problems of ageing financial advisors. He is much more computer savvy than expected with lots of credible research to back up his points. Simon distinguished himself from being a motivational speaker. Simon's presentation is all solid practice management material and ranks right up there with comparable speakers like Wayne Cotton."

Terry J. McBride, B.Comm., CLU, CFP
Tax and Estate Planner
President, Advocis North Central Saskatchewan (2007)
Raymond James Ltd. Saskatoon, SK
terry.mcbride @ raymondjames.ca

