

SIMON REILLY

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PROFESSIONAL PROFILE

- Coaching financial advisors on how to develop, maintain and grow their business
- Motivating and inspiring financial advisors through the Clear Your Roadblocks™ and the One Page Business Plan™ speaking presentations
- Coaching financial advisors on developing a business plan through the One Page Business Plan™ to create a Vision, Mission, Objectives, Strategies and Action Plans
- Coaching financial advisors on managing their cash flow and sales through The Leading Advisor Budget Cash Flow / Sales Activity Calculator System
- Coaching financial advisors with managing their time through The Leading Advisor Time Management System
- Assisting financial advisors with hiring and building a team through the use of TTI Performance Values & Behaviors Assessment Systems and The Leading Advisor Hiring System
- Coaching financial advisors on improving their marketing and sales through The Leading Advisor Attraction Marketing System
- Assisting financial advisors with improving customer service through The Leading Advisor Client Engagement System
- Excellent business management skills through the use of the One Page Business Plan™
- Excellent computer skills including knowledge of software that includes AudioAcrobat, Camtasia, Dragon Naturally Speaking, Dropbox, EverNote, GoToMeeting, iWorks, LogMeIn, Maximizer and Microsoft Office Suite
- Excellent coaching program development skills delivered by way of one-on-one coaching, live workshops, public speaking and webinars
- Excellent public speaking and Microsoft Power Point skills
- Excellent social media skills including blog, e-newsletter and web site filming and writing through the use of Facebook, Hootsuite, LinkedIn, Twitter, Wordpress and YouTube

PROFESSIONAL EXPERIENCE

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| Leading Advisor Inc. – Parksville, BC | 1995 to date |
| • Financial Advisor business coach, speaker and writer | |
| Anthony Robbins & Associates , Vancouver, BC | 1990 – 1995 |
| • Vancouver, BC franchise co-owner, business coach, facilitator and speaker | |
| National Heating Ltd. – Langley, BC | 1985 - 1990 |
| • Sold heating systems to new home builders | |
| National Aluminum Products – Langley, BC | 1977 – 1985 |
| • Sold aluminum windows to new home builders | |

Bowman's Mill – Chilliwack, BC 1976
 • Worked on green chain in Lumber Mill

L.C. Feed & Pallet – Chilliwack, BC 1973 – 1975
 • Delivered coal & hay

EDUCATION AND TRAINING

Senior Certified One Page Business Plan™ designation 2010 to date
 • One Page Business Plan™ Company, Berkley, CA

The Business Coaching School 2004 to date
 • Chris Barrow, Hale, Altrincham, United Kingdom

Values & Behaviors Analyst Training 1997 to date
 • TTI Performance Systems Ltd., Scottsdale, AZ

Graduated CoachU Coaching Training Program 1995 - 1998
 • CoachU, Bradenton, FL

Emotional Release, Family Systems & Inner Child Training Workshops 1993-1995
 • Clearmind Institute, Langley, BC

Franchise Business Coach, Facilitator and Speaker Training 1990 - 1995
 • Robbins Research International, San Diego, CA

The Pursuit of Excellence Series 1984
 • Context Training Inc., Vancouver, BC

Chilliwack Senior Secondary School 1973
 • High School Graduate

PUBLICATIONS

Monthly E-Newsletter - Plan * Practice * Profit 2004 to date
 • 1500 readers / 85 monthly editions

Daily Blog - Plan * Practice * Profit 2005 to date
 • 1800+ blogs

Book - Curing the Unmet Needs Disease 2008
 • 2200 printed copies

ASSOCIATION MEMBERSHIP

Advocis (The Financial Advisors Association of Canada), member 2005 to date
 • Toronto, ON

IFB (The Independent Financial Brokers Association of Canada), member 2007 to date
 • Mississauga, ON

NAIFA (National Association of Insurance and Financial Advisors), member 2010 to date
 • Falls Church, VA

ACCOMPLISHMENTS AND VOLUNTEER WORK

The Hoopis Performance Network - Volunteer Author	2012
• Chicago, IL	
Advocis (The Financial Advisors Association of Canada), CE Accredited Speaker	2011
CLU (The Chartered Life Underwriters Association)	
• Toronto, ON	
Investment Executive – Interviewed	2011
• Toronto, ON	
Senior Market Advisor Magazine – Volunteer Writer	2011 to date
• Centennial, CO	
Advocis (The Financial Advisors Association of Canada) - CE Accredited Speaker	2010
CLU (The Chartered Life Underwriters Association)	
• Toronto, ON	
NAIFA – Iowa Magazine – Volunteer Writer	2010
• Cedar Falls, IA	
Voted #2 in Advisor.ca’s 2010 Name That Visionary Contest	2010
• The Advisor Group, Toronto, Ontario	
Advisor.ca Magazine – Volunteer Writer / Interviewed	2009 to date
• The Advisor Group, Toronto, Ontario	
The Elite Advisor – Volunteer Writer	2008 to date
• London, ON	
Advocis Forum Magazine – Volunteer Writer	2007
• Toronto, ON	
Advocis (The Financial Advisors Association of Canada) - CE Accredited Speaker	2006 - 2009
• Toronto, ON	

MAIN STAGE SPEAKING ENGAGEMENTS

• PPI Solutions, Kananaskis, AB	2011
• Great West Life, Montreal, QC	2010
• Hub Financial, Calgary, AB	
• Hub Financial, London, ON	
• Hub Financial, Montreal, QC	
• Hub Financial, Toronto, ON	
• Hub Financial, Vancouver, BC	
• Hub Financial, Victoria, BC	
• London Life Insurance Company, Montreal, QC	
• Sun Life Sales Congress, Toronto, ON	
• Sun Life Sales Congress, Winnipeg, MB	
• Financial Management, Calgary, AB	2009

VOLUNTEER SPEAKING ENGAGEMENTS

2011

Advocis

- Ottawa Chapter - Ottawa, ON
- Winnipeg Chapter - Winnipeg, MB

NAIFA (National Association of Insurance and Financial Advisors)

- Falls Church, VA

Senior Market Advisor Magazine

- Centennial, CO

2010

Advocis

- Westman Chapter - Brandon, MB
- London Chapter - London, ON
- Sarnia Chapter - Sarnia, ON
- Vancouver Chapter - Vancouver, BC

Canada Life

- Toronto, ON

NAIFA – Iowa

- Cedar Falls, IA

The Million Dollar Round Table

- Park Ridge, IL

2009

Advocis

- Bay of Quinte Chapter - Trenton, ON
- Kingston Chapter - Kingston, ON
- Kootenay Chapter - Trail, BC
- N. Central Saskatchewan Chapter - Saskatoon, SK
- Newfoundland & Labrador Chapter - St. John's, NL
- North Bay Chapter - North Bay, ON
- North Western Ontario Chapter - Thunder Bay, ON
- Ottawa Chapter - Ottawa, ON
- Sault Ste. Marie Chapter - Sault Ste. Marie, ON
- Thompson Okanagan Chapter - Kelowna, BC
- Sudbury Chapter - Sudbury, ON
- Toronto Chapter - Toronto, ON
- Victoria Chapter - Victoria, BC

2008

Advocis

- Calgary Chapter - Calgary, AB

2007

Advocis

- Durham Chapter - Oshawa, ON
- N. Central Saskatchewan Chapter - Saskatoon, SK
- North Western Ontario Chapter - Thunder Bay, ON
- S. Saskatchewan Chapter - Regina, SK

2007 to date

IFB (The Independent Financial Brokers Association of Canada)

- Calgary AB, Mississauga ON, Vancouver BC

2006

Advocis

- New Brunswick Chapter - Moncton, NB
- Northern Alberta Chapter - Grand Prairie, AB
- Okanagan Chapter - Kelowna, BC
- Vancouver Island Chapter - Nanaimo, BC
- Westman Chapter - Brandon, MB

Certified Financial Advisors

- Vancouver, BC

Certified Management Accountants

- Victoria, BC

2006 - 2011

Pro-Seminars

- Calgary AB, Edmonton AB, Kitchener ON, London ON, Ottawa ON
Saskatoon SK, Vancouver BC, Victoria BC, Winnipeg MB, Toronto ON,
Las Vegas, NV