

A Taste of MDRT

Advocis™

May 21, 2009

Pan Pacific Hotel
300 - 999 Canada Place Vancouver

Time: 7:30 am – 11:00 am
Cost: \$50 (incl. GST)
NO CHARGE for Advocis
Seasons Pass Holders
(click here to RSVP)

Includes buffet
breakfast

The Million Dollar Round Table is coming to Vancouver on May 21, 2009!

The Million Dollar Round Table is the Premier Association of Financial Professionals. It is an association of less than 1 per cent, of the world's most successful life insurance and financial services professionals. MDRT members demonstrate exceptional professional knowledge, strict ethical conduct and outstanding client service. Advocis Greater Vancouver annually provides its members with the opportunity to experience A Taste of MDRT.

Panel Discussion: Tips From The Top

An Interactive Workshop like no other, starring Gary Zlotnik, Paul Shaw and John Nicola, moderated by well known industry icon Jim Rogers (Past President of MDRT and Advocis National).

Here's your chance to find out how these highly successful people attract and keep their top clients. Seldom are we privy to such expertise. You will be able listen and compare how each of them finds new clients, prepares for and conducts the initial interview, closes the deal, and then keeps the clients happy enough that they don't stray to greener pastures. That last item is key today! And there will be many opportunities for your questions during the workshop. Advocis is thrilled to have these well recognized and accomplished business people come together and discuss their best practices for success (as well they are all TOP of the Table MDRT producers).



Jim Rogers,
CBA, MBA,
CFP, CLU, is
the 2008
MDRT
President.
A 34-year
MDRT

member, he has 25 Top of the Table honors and has served as a Chair and member of numerous Round Table committees. In 2001, Rogers was the first recipient of Advisors Edge magazine's Career Achievement Award.



John Nicola,
CLU, CHFC, CFP
,has been in
the financial
services
industry since
1974, and
currently

provides strategic leadership to Nicola Wealth Management. From the creative use of corporate savings to the concept of using insurance as an investment vehicle, under John's guidance Nicola Wealth Management continues to be a leader in the financial planning industry.



Paul Shaw,
CLU, earned
a B. Comm
degree from
UBC in 1967,
and in 1982
became a
founding

partner of Granville West Group, as well as a life & qualifying member of MDRT. Paul has served as President of Advocis Vancouver and the BC Manager's Association, and is currently a member of CALU and the Estate Planning Council of Vancouver.



**Garry
Zlotnik,** CLU,
CHFC, CFP,
After graduat-
ing from UBC
in 1978 with
a Bachelor of
Commerce

degree, Garry went on to become a Chartered Accountant with a national accounting firm. Garry joined ZLC Financial Group in 1981 and became President in 1993. He specializes in estate and retirement planning and structured settlements. Garry is married and has two children.



The Million Dollar Round Table (MDRT) is an association for leading sales professionals in insurance and financial services worldwide. It has more than 34,000 members from 74 countries, among these are 1,063 from Canada.
<http://mdrt.org>

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3 CE Credits (to be confirmed)

"I Don't Know What To Say"

A presentation by Julian Wise TEP

Julian will empower you to deal more effectively with the needs and feelings of someone who has had someone close to them die - and feel more comfortable doing so. His talk will address some of the issues he had with insurers he dealt with, it will offer you several things to say and do, warn you what not to say or do, and highlight what support you should provide as an advisor and friend.



Julian's 33 years in the financial services industry was preceded by careers at the Financial Post and as an independent producer of current affairs TV shows in the U.S. He is a 30-year Million Dollar Round Table member, with more than a decade of Court of the Table, and two Top of the Table qualifications.

Julian lives in Oakville, Ontario, Canada with his fiancée Nandita, their dogs Bentley, Lucie and Kyan, and 16 year old cat Masi.

Some feedback from Julian's previous presentations:

"Very touching presentation."

"Your presentation made me reflect on my personal and my everyday job."

"Julian has shown some really meaningful insights about how insurance companies can improve in terms of dealing with customers."

"His presentation was effective and moving."



MDRT®

Members register online: www.advocisvancouver.ca/events/taste-mdrt

Seasons Pass Holders please confirm attendance via email: info@advocisvancouver.ca

REGISTRATION FORM

Advocis - Greater Vancouver:

A Taste of MRDT

Please ICS, Fax or Email your registration to:
ADVOCIS Vancouver, 102 - 211 Columbia St, Vancouver, B.C. V6A 2R5
Phone: 604-941-9657 Fax: 604-681-4545
Email info@advocisvancouver.ca Web: www.advocisvancouver.ca

Book Today!

Limited seating
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Name on card: _____ Card #: _____

Expiry date: _____ Signature: _____