



FINANCIAL PLANNING IN TROUBLED TIMES (A MASTER CLASS WITH PAUL ETHERIDGE)

The world's most experienced user of Prestwood software

Many clients are facing significant challenges in 2009 and there will be tremendous opportunities for Financial Planners with Prestwood software to help them whilst further developing the profitability of their own businesses

This is your chance to gain inspiration and guidance on how to build a more profitable fee based financial planning practice in spite of current economic conditions

Paul will run a special **ONE DAY INTENSIVE WORKSHOP** at Beauchamp House on
Tuesday, 30th June

**How to generate personally at least £400,000 pa in fees and commission
and get on track for £1,000,000 pa in the future**

Subject to time constraints, he will cover:

- How to recruit high quality clients and manage financial planning meetings.
- How to ensure your terms of business are attractive to clients as well as yourself.
- How to make cash flow forecasts 'come alive' as you and your clients work together on what-if scenarios. This is where many Planners miss opportunities.
- How to get the most out of a Financial Planner/Paraplanner partnership.
- How to motivate clients to invest **NOW**.
- **Problem solving:** Any questions about developing a more profitable business.

If the transition to successful Financial Planning is a journey from A to Z, you may be at B or you may be at Y, but the bullet points above are equally applicable. We very much hope that the seminar will be attended by a good mix of planners at all stages in their transition.

This is an opportunity to get valuable guidance from one of the UK's most experienced practitioners. Remember, just one idea could repay your investment a hundred times over.

About Paul Etheridge

MBE, TD, JP, MBA, FIFP, CFP, FCII, ACI Arb

A Certified Financial Planner and a Chartered Insurance Practitioner

Founder of the IFP; President for 10 years; a Board Member for 20 years; a fee-based Financial Planner for more than 25 years

Numbers are strictly limited so ACT NOW. If you would like to reserve a place, print out, complete and return the attached booking form with your payment ASAP. Enquiries: Tel: Chris Whitehouse 01384 872137

Philip Congrave

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Financial Planning In Troubled Times

(A Master Class with Paul Etheridge)

30th June 2009

At Beauchamp House, Wolverhampton Road, Prestwood, Nr. Stourbridge,
West Midlands, DY7 5AF

BOOK NOW! FAX TO: 01384 872318

Or send us an email – chris@prestwood.info

TIMES: Arrive 9.30am for a PROMPT 10am start - finishing around 4.30pm

I WISH TO BOOK A PLACE AT THIS MASTERCLASS AND AGREE TO PAY

THE ATTENDANCE FEE OF £287.50 (£250 + VAT).

(Members of The Prestwood Advanced Planners Group can choose this as one of their workshops at no charge other than their normal subscription)

Please complete clearly in BLOCK CAPITALS:

Company name: _____

Address: _____

Delegate name: _____

Email: _____

Telephone/Mobile: _____

Signed: _____

Date: _____

PLEASE NOTE THAT BY SIGNING THIS FORM YOU ARE CONFIRMING A DEFINITE BOOKING FOR WHICH AN INVOICE WILL BE RAISED FOR IMMEDIATE PAYMENT.