

BUSINESS BUILDER RETREAT

NOVEMBER 10 – 11, 2018



DANIEL COLLISON B.A., CFP, TEP
Managing Partner, Advice to Advisors

Daniel Collison examines the three critical roles of today's World-Class Practitioner – The Tactical Technician, The Strategic Manager, and The Enduring Visionary in his book, **The Financial Advisor's Guide to Excellence** to show financial advisors how to turn every aspect of technical planning, business management, and marketing and prospecting, into well orchestrated, easy to implement, step-by-step processes. In taking this quantum leap, the financial advisor makes a critical decision: *can I grow a business that has market value?* If prepare to answer yes, the process-driven World-Class advisor turns a significant corner towards maximum impact in both the lives of the clients they serve, and that of their circle of family and business relationships.