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PUERTO
VALLARTA,
MEXICO.
NOVEMBER 10-13,
2019

2019 Distinguished Advisor Conference

LEARN MORE ABOUT "MODERN PROSPECTING THEORY: IT ALL STARTS AND ENDS WITH TAX"
WITH SPECIAL GUEST KEYNOTE SPEAKER DANIEL COLLISON.
REGISTER BY SEPTEMBER 15

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DANIEL COLLISON
B.A., CFP, TEP
MANAGING PARTNER,
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SPECIAL GUEST SPEAKER ON
DAY 1 OF DAC

MODERN PROSPECTING THEORY: It Starts with Confidence and It Ends with Tax

A recent Natixis study showed that 58% of Canadian investors would leave their financial advisors if they could find one that could explain the taxation on investment income better. Financial Advisors need to flip this on its head and go to market with a process that shows their clients and prospects that they are the tax planner for them. They need a simplified tax planning process that they can verbalize and that retains clients and drives prospects to them.

In his not-to-miss session at DAC, Mr. Collison will be speaking to leading tax and financial advisors about the need to rejuvenate and reinvigorate their businesses with new client acquisition. And because Canadians can't possibly understand the complexities of the income tax system, they're desperately looking for an advisor that can make it simple and that can reduce their tax bill. Combined, these facts demand that advisors bring quality tax planning to market, and that they learn to prospect with tax planning knowledge rather than financial products.

Hear from 19 outstanding thought
leaders, and network with hundreds
of leading advisors, only at DAC.

Agenda

Register