

SYMPOSIUM 2005: Planning for Success
Attendee Evaluation – Comments from 272 participants:

Allaire, Marc (CBOE)– Proactively Manage Risk & Generate Income w/ Options:

Rating 3.30	4	3	2	1
Tuesday 50 evals/50 participants)	20	25	5	

- Good resource and information
- Basic
- Very good!
- Clearly presented
- Great job, excellent and clean presentation
- Great way to explain options w/ clients with the Home Insurance analogy
- He presented well but the presentation was too basic
- Basic, yet informative
- Sharp and witty guy
- Excellent!
- Too basic!
- Was not believable

Burke, Bob – Long Term Care:

Rating 3.19	4	3	2	1
Tuesday 52 evals	26	15	6	5

- Good sales concepts
- Was hoping this would be more “strategic” ideas for using LTC in planning
- Would prefer an education and LT Care strategy presentation vs. “how to sell”
- Mumbled when he talked. He was selling us on selling LTC. Help us sell!
- Talks too fast – couldn’t understand everything
- Very important topic delivered by a very unprofessional and poor presenter. Completely disappointed- must find a better outlet to handle this topic in the future.
- Presentation was a bit intimidating
- Great content, speak more slowly
- Too sales pressure oriented, no technical merit
- Somewhat direct

Evensky, Harold – Investment Think Tank:

Rating 3.41	4	3	2	1
Wednesday • 202 evals	106	74	21	1

- Thought provoking, very beneficial
- Excellent discussion of portfolio management
- This is a true practitioner w/ the due diligence and contacts to back it up
- Not very clear about what exactly he was trying to get at
- I think he uses (manipulates) statistics to prove his conclusions falsely (why 1871)!! Anyone that thinks he knows what the market will do for the next 10 years is a fool or ego maniac
- Same info could have been covered in an hour
- Used good material
- Nice to see someone representing bears @ an FPA Conference

- Always good to get all views
- Would have liked to see sample satellite and core investment options
- Could have been condensed to 1 hour easily
- Hard to understand
- Should update slides – stop using 2001! Otherwise good info.
- Difficult to distill the main points/strategies
- Used old data! (2001)
- Excellent alternative viewpoint to yesterday’s presenter
- Enjoy life learner and leader in best practices
- Great material and cause to think
- Although based on a narrow premise, it was still worthwhile as a defense against a low market
- Allow for Q & A, too rigid on time
- Too long for the message
- Great presenter and thought provoking presentation
- Interesting
- Great strategy. I like the fact that he strongly encourages advisors to change what they have been doing.
- Really was very limited in his view. He gave insight on what to do with a \$23,000,000 client. Does this reflect the average CFP? Get real.
- A little boring story
- FANTASTIC! Exactly the detail investment information we need to hear from such a credible source to help us add value to our clients
- Spent too much time “making his case” and very little time on how to implement. We need ideas we can use.
- Always good to have a speaker challenge the investment thought process – Fantastic!
- Outstanding
- Always thought provoking
- Good
- Info got pretty dry. Could have covered content in ½ the time. Good topic though.
- Very timely, well worth the time and money for conference
- More uncertainty and contradiction
- Good information – very unclear deck page slides – hard to understand
- What above qualified and over 20% of what we manage
- Great subject material

Gegax, Tom – Planning for Business Owners:

Rating 3.06	4	3	2	1
Tuesday • 199 evals	63	86	48	2

- Would like to see a presentation for professions in our field
- More retail than specific to the FP industry
- Didn’t really get going until Q & A
- Nice to have a speaker from outside the industry
- Interesting
- Didn’t work for me
- Great perspective
- Did not speak clearly into microphone so it was difficult to hear and understand
- Interesting, but too focused on selling his book. No “book” will make a business owner successful.
- Interesting comments about running a biz
- Too much self promotion of book, tires don’t necessarily follow to FP
- Nice presentation – need to look to Tires Plus for tires
- Good Speaker... Good as far as it relates to our business
- Overly basic

- Great insight from a business owner
- Ok
- Too much selling his book & system
- For the meat we need to buy his book?
- Good speaker and provided simple and practical advice
- Too much of a commercial for his stuff
- Too much like an ad for his book
- Just ok
- We all need more of this!
- Great to have speaker from outside the financial industry
- Sound system made it difficult to hear
- Very honest straight-forward advice
- Good business practice overview in general terms
- Tough start – always test your props
- Good thing he sold tires
- Selling Books!
- Tom missed the subject. Presentation was on how to run a business – a retail business that is.

Gordon, Miles – The World is Getting Flatter, Freer and Richer:

Rating 3.54	4	3	2	1
Tuesday • 184 evals	114	57	12	1

- Timely information
- Another Bush basher
- Always like macroeconomics
- Great global view perspectives on Washington
- Interesting global perspective
- Excellent – Don't be so rigid on time, allow for Q & A
- Very good speaker
- Interesting perspective
- Good perspective/interesting
- Interesting perspectives – Thanks!
- Fantastic!
- Always neat to get positive outlook on future
- Needed to allocate more time for him
- Bright, articulate & candid
- Great! Could have been longer! Could he come back?
- Very informative – Not enough time
- Interesting good presentation
- Very good
- Good speaker
- Great insight into the world economy
- Interesting
- Informative but it went on too long and had no clear direction
- Good, but I'd like to hear his sources. Seemed a bit like O'Reilly. Was good to listen to.
- Ok. Too complex lost me.
- Good speaker, but I strongly disagree with his viewpoint on budget deficits

Green, Jeffrey – Paperless Office:

Rating 3.47	4	3	2	1
Tuesday • 30 evals/35 participants	18	9	2	1

- Good speaker, but I couldn't really understand what he was talking about
- Very good!
- Very good despite having the flu!
- Good info – Presenter was ill. Coordinator could have called 5-minute break to allow him to cool off & regain composure, under guise of room being too hot (it was) and needing to have doors open & people move out.
- Lots of info I don't normally access. Useful to have here. Good vendor addition.
- Information in this area is needed. Very knowledgeable
- Very informative
- Room uncomfortable – not advisor oriented
- I will use this info
- Brings a solution to growing concerns – confidentiality, compliance and easy to use.
- His knowledge on the imaging technology & compliance is extensive
- Helpful compliance issues

Lennick, Doug – Behavioral Advice:

Rating 3.72	4	3	2	1
Wednesday • 195 evals	146	45	2	2

- Very Good! Please ask him back for 2006 meeting.
- Please have article & website reference info in handouts if speaking at a lunch session.
- Great, as usual, he should have more time
- Entertaining & informative
- Great job
- Best of the Symposium
- Doug is always outstanding
- Entertaining & interesting
- FABULOUS! Right on – Great presentation
- Always good stuff
- Good presentation subject – hard to hear speaker
- We need more of this
- Much better than he usually is
- Another life learner – Message delivered with conviction & sincerity
- Could he do a 2 hour or longer one sometime?
- As always, Doug is entertaining and informative
- He was awesome! We need more on the behavioral/sales & emotional side and less technical speakers.
- Info was very useful in many ways
- Best presenter of the day!
- Awesome
- Fantastic! Thanks for having him speak.
- The best speaker so far
- Excellent, much better than Nick Murray!
- Always fabulous
- Very good (2)
- Outstanding

Loveland, Keith & Matt Boos– FPA Ethics Course:

Rating 3.61	4	3	2	1
Tuesday • 108 evals/113 participants	74	28	4	2

- So much fun & very educational
- Good CE credit
- Room was too small and very warm
- Keith is creative, but 2004 was better
- Very good again
- Great case studies & resulting discussion
- Presentation was good, group exercises were dull
- Crowded room but Keith and Matt did a great job regardless
- Improve sign out; room extremely hot
- Facility inadequate & too warm
- Room too small – too hot. I hate group work.
- Way too little space – very hot and crowded – but otherwise great session
- Needed to have a larger room for this course
- Room was too small to accommodate all in attendance – also too warm
- Great presentation
- Good speaker, not up to his usual effectiveness. Too many thin situations, rather than digging deeper.
- Great job – made ethics course fun & got everyone involved, 2 hours flew by.
- Great session!
- Could have used a much longer room
- Too small room, too hot, poorly organized sign out (only 2 sheets! For whole room!)
- Need bigger room – best ethics course ever!!
- Excellent
- Would have liked more “concerto” bullet points
- I’d prefer they skip the group interaction and present more information. Room was too small.
- No one does it better than Keith
- I don’t think anyone can cover ethics any better!!
- Room too small; too much time on small group – missed 2 answers
- I took this and I didn’t even need it! They’re that good! Keith thanks for the new illustrations!
- A fun way to get the ethics done!
- Very good – interactive approach was great!
- Room was way too small!

Reynolds, Jim – Practice What you Preach:

Rating 3.23	4	3	2	1
Tuesday • 209 evals	90	84	28	7

- Very moving
- Was very touching – Kathy Moss was outstanding
- Good Story
- Amazing. Timing on message couldn’t have been better.
- More detail on the way they structured transition
- Interesting topic and speaker
- Good advice, great story
- Very moving presentation
- Rambling, somewhat uncomfortable and not pointed valuable
- Outstanding
- Powerful story, but not laid out in a way we could really gather much practical advice/knowledge
- Good explanation – made me think

- Dramatic
- This should have been “Jim Reynolds and Kathy Moss” – He made the revenue & she protected it with good planning
- Thank you for sharing
- Heartfelt
- Poignant, heartfelt story
- I liked his talk
- Moving/useful
- Real life examples – made a strong impact
- Excellent message
- Great story
- Too long
- Bad sound
- Thank You
- Good, but it was hard to hear him at times
- How did they value the practice?
- Fabulous – really makes you think about life, family and how work really plays into your plans
- Didn’t quite see relevancy – title didn’t match presentation
- Thank you for sharing your story

Robinson, Craig – Invest in Companies Using Total Quality Management:

Rating 2.70	4	3	2	1
Tuesday • 43 evals/59 participants	7	19	14	3

- Repetitive. We have heard him @ FPA mtg., didn’t need ethics (You know what I mean, I already took the course), don’t do options.
- Good product presentation
- Very boring – poor topic- not compelling
- Didn’t find it to be very interesting
- Seemed like a sales presentation – How did he get in?

Tibergien, Mark – What Makes Elite Practices Tick?:

Rating 3.56	4	3	2	1
Tuesday • 203 evals	131	54	18	

- Solid, how can there be no credits for Tibergien sessions? He hits the value proposition every time.
- I work for a big firm, so this was interesting, but did not apply as much. Would have been nice to have other breakout sections available during this time. Give options.
- CE's would be nice!
- A little dry but great info content
- Useful survey results on Elite practices
- Good info and entertaining
- Great stuff but too fast to take it all in.
- Very appropriate for where my business is now
- An excellent guide for business planning as we look to 2006
- Pretty good- Felt repetitive, but maybe because I’ve read his articles
- Excellent, He knows and understands our business. Thought provoking/useful. Good sense of humor especially for a CPA ☺
- Got you thinking about how we’ll manage our practice
- Very good (2)
- Good structure to make decisions – yet still my problem

- Probably does not apply to my size business
- Great speaker, relevant topic specific to our group
- A lot of great studies to back up what he was talking about
- Thanks for adding a few jokes within the presentation
- Great talk
- I wish there was some type of book that I could read. Great information.
- Outstanding; Mark provided good timely info
- Really good
- Excellent content, knowledge and presentation
- Important to review our practices in comparison
- Important to review our practices to trends
- Very interesting info to consider for our practice
- Tries to generalize too much about what’s happening in the industry. My model is for more effective than his talk assures
- Applicable – enjoyable
- Too much review of a survey
- Very industry
- Very good!!! Very valuable.

Tibergien, Mark – What Makes Strategic Alliances Work? :

Rating 3.55	4	3	2	1
Tuesday • 207 evals	125	70	12	

- CE’s would be nice
- A little dry but great info content
- Good info and entertaining
- An excellent guide for business planning as we look to 2006
- Good ideas
- Bring this message back every year
- Very thought provoking – somewhat sophisticated for a small firm
- Very Good
- Should have defined strategic alliances. I never figured out what he really meant, though I understood each part
- Great talk
- Great information – write a book
- Really Good
- Good material – Alliances work well
- He was a great speaker until he made an incredibly insulting comment in response to a woman (who identified herself as a staff person to an advisor) who asked a question during Q & A. He told her that her question “was better suited for Ann Landers.” It was unbelievably offensive!
- Helpful – took some “action items” away
- Great as always

Wallach, Lance – Voluntary Employee Benefits Association (VEBA’s):

Rating 3.10	4	3	2	1
Wednesday • 164 evals	63	65	25	11

- Typical east coast attitude – when difficult topic good speakers needed to simplify concepts to understand
- Would have liked slides with prepared outline of his comments
- I’ve done a lot of research on VEBA’s and I don’t believe his information was accurate
- Please do not ever bring him back!
- The juxtaposition of Doug Lennick’s presentation about “moral compass” and this slick, self-serving presentation was too rich. Ugh!

- Like hearing about VEBA’s needed more nuts and bolts about it
- Something that I will introduce to my business clients
- What a contrast from the lunch speaker – is there any local experts in VEBA’s
- Interesting
- Excellent topic and presentation
- He should have spent more time preparing a meaningful presentation and less time on the “prizes.” It could have been a great topic...
- Selling snake oil? I don’t feel this is appropriate - moral concerns.
- Good speaker, but presentation was random and ill prepared
- Great speaker – needed to have 15 minutes of high level before going to questions
- Don’t know much about this – good prizes
- How to train staff on subject?
- Interesting (2)
- Repeats himself too much
- Very thought provoking & educational
- Great sense of humor – prefer slide presentation
- Very informative
- Deeper discussion to topic that has been just mentioned in articles
- Good speaker! Timing was good – subject got better as it went along
- Annoying guy; worthwhile subject
- Hit and miss, no flow – needed the basics – selling the idea but no meat – lousy speaker
- Good to have “risky” options discussed – speaker weak
- New information to me
- Very disappointed presentation; did not understand if VEBA’s should be used; I did not see much benefit from this presentation
- Kind of confusing
- A lot of repetition (in speech) and name dropping – I didn’t appreciate his style of speaking
- Limited application w/ potential traps. Interesting
- Who invited him? Not presented effectively – Presenter does not embrace FPA core values. Don’t invite him back.
- Informative – yet limited applicability
- More definition of what this is
- Always good to hear about new ideas, but this seems a bit on the edge...
- Interesting guy, an outline would be nice
- I learned next to nothing about VEBA’s. I did learn all about this guys Saturday touch football career, where he went to college, who his pals are in the IRS, etc... This could have been a good learning opportunity – but was not presented well for persons who weren’t already familiar with topic. This was a teaser for us to call him (& hire him).

Bridge the Gap – Finding a Career & What’s Your Plan:

3.75 Tuesday (8 evals/ 20 participants) Finding a Career	4: 6	3: 2	2: 0	1: 0
3.36 Wednesday (14 evals/ 17 participants) What’s Your Plan	4: 6	3: 7	2: 1	1: 0

- Very helpful
- Very helpful, good speakers/discussion leaders
- Excellent panelists!!
- Interesting, but would be nice to see more relevance for students. Would have liked to attend the options speech. Was able to gain insight into FP industry. Good to hear development of profession.
- Good session
- Great for people who want to know how older 20 something’s broke into the industry, worthless of anyone else.

ECONOMIST PANEL:

Kelly, David

Rating 3.84	4	3	2	1
Wednesday • 158 evals	132	26		

- Excellent this is information that helps us talk knowledgably with our clients
- Always good to listen to
- Very interesting – easy to listen to
- Thank you for a another meaningful presentation
- Interesting – Good speaker
- Very passionate and convincing
- Always good – passionate
- Handouts would be nice
- Great
- Good info (2)
- Great as usual
- He’s great
- Love Him!
- Like his rapid fire approach
- Excellent!
- He is as good as it gets
- Always a welcomed guest
- Excellent! Please ask back
- Meaningful, organized, informative. Good presence
- He is always good – thank you for bringing him back
- As always, fantastic!
- No written materials
- Good
- Valuable information, easy to follow, kept my attention very well
- Good info – should have studied slides, hard to hear

Madden, Toby:

Rating 3.52	4	3	2	1
Wednesday • 153 evals	89	55	9	

- Very informative
- Tough to follow David
- Animated, good but a little long
- Come back next year!! Great job
- Hard to follow David Kelly
- Great
- Good info.
- Much improved presenter over last year
- Good perspective
- Amazing for a Federal Reserve guy and accountant
- Very Good! (2)
- Good overview
- Excellent! Please ask back
- Have him back again
- Excellent – saw @ federal reserve last week; entertaining
- Just fine
- Liked his presentation – easier to follow than art

Steinmetz, Art:

Rating 3.54	4	3	2	1
Wednesday • 151 evals	86	60	5	

- Excellent, Professional, the best
- Handouts of slides would be nice
- Great
- Good info
- Intriguing info
- Good fill in
- Definitely liked international perspective!
- Technical but very good!
- Almost very good
- Very good presentation
- Excellent! Please ask back
- The American public should not take on credit cards
- Great job
- No written materials
- Excellent speaker
- Would have really liked his presentation graphs in the handout material. NEVER MIND, web link, actually would have liked to take notes on.
- Good story – easy to follow and hear

Economist Panel (Overall Comments):

- Great
- Good Info!
- Excellent overall – nice to have a portfolio mgr.
- Yes, please always do this again
- Good balances with these three

IRS PANEL:

Gregory, Mike:

Rating 2.68	4	3	2	1
Wednesday • 209 evals	36	83	77	13

- I do not need to know, nor do I care, about the organization or structure of the IRS
- Clear presentation – like all the IRS speakers – not much practical advice for us
- So-so
- Please explain LILO/SILO, lease stripping
- Could have applied more directly to our business
- Maybe find IRS people who are closer to our industry.
- Way too much time spent on telling us what your agenda is, who you are – wasted time
- Estate valuation not as germane
- Spent too much time on IRS structure
- What a great idea - Thanks Joe – “Clem” – keep it up next year!
- More basic tax issues should have been discussed.
- A little hard to understand at times (Could have been the microphone)
- Good topic
- Excellent recovery on question on annuity sold for loss
- Would like to see more individual tax comments
- Having the IRS present is a good idea but it has to relate more specifically to our profession

- I believe it would have been a better use of time to have the panel walk through case studies that are applicable to our average client profile; e.g., estate planning, charitable giving, transition of wealth, small business owners taxation and succession planning, as well as address pending legislation.
- Needed relevance to our practices
- Allow for Q & A, too rigid on time more information on tax issues for individuals and for typical financial planning clients not even for small businesses i.e., IRA distribution, AMT, etc. This group didn't fit for my business.

Ruegg, Robin:

Rating 2.54	4	3	2	1
Wednesday • 204 evals	21	84	84	15

- Clear presentation
- So-so
- Most not relevant – skipped sections that might be...i.e., golden parachutes
- Cut to the point – the meat of the info – don't care about how many engineers work for you.
- Warning issues very good
- Having specific range of discounts on valuation of limited family partnership will help us understand the reasonableness viewed by IRS

Voeller, Jerry:

Rating 2.63	4	3	2	1
Wednesday • 210 evals	25	93	81	11

- Dry presentation
- So-so
- Most not relevant topics
- FPA should have had IRS experts on land issues, IRA's and small business!
- Hard to understand – talks too fast
- Enunciate better – talk too fast – couldn't understand all from IRS – Good info
- Very monotone
- Sorry – Just not motivating
- Couldn't understand

IRS Current Front Panel (Overall Comments):

- Should have brought in individual tax experts
- Less on how they work and more on what they are working on like “live cases” – Why they are looking – What to do to keep client from audit!
- Let/have these speakers walk around to present then sit for panel. Long time to watch people sit behind table
- Speakers were fine but this was the wrong panel w/IRS experts for the Symposium
- Well organized, informative, and sincere
- Not applicable to my financial planning practice
- Good to have this prospective – Toastmasters would have helped this group – Good answers to questions
- Disappointingly vague – the information presented by the whole panel was of marginal value, it also reinforces that the IRS is a most bizarre agency. They have an unduly complicated structure to enforce the unwieldy tax code.
- Modest interest to most planners – didn't get too deep on estate info and knew nothing about IRA's and other common FP topics
- Lets do this again, but have insurance and securities experts and personal income tax experts.
- Too much on IRS “structures” – Not enough on examples that would be of interest to us
- Poor questions but good presenters
- I suggest an annual update on IRS code changes and hot topics

- All excellent content and a vital topic
- Not useful info
- Needed examples not how they are set up and qualifications – waste of over an hour/time
- Would like to see more on individual income tax strategies
- Its hard to make taxes, especially enforcement, an exciting topic
- Very dry. Didn't seem relative – weren't qualified to answer most questions – Didn't see the point of their appearance
- Good topic – recommend for breakfast??
- Limited applicability – most attendants did not understand topic or are able to apply to their practice
- All good presenters too much organization, not enough on “red flag” issues
- Good insight to IRS – a bit dry – more cases would have been interesting
- Real people with dry humor
- Boring
- They had to make this much more relevant to us and make it much more interesting. I'd rather hear stories than facts.
- Prefer tax advisors with specific examples of personal tax planning and personal and small business tax issues
- Not related enough to examples related to CFP's
- The presentation was ok, some interesting points, however, someone that could address personal income tax (vs. large businesses) questions would be more relevant for the audience
- Not applicable for 99% of my business
- Too much on what they do – not how it applies to us or to our clients - could've been a very valuable session.
- Should have been more focused on investment issues

General Comments:

- Very, Very good conference! Well worth attending! Very well rounded.
- Rude and poor time management – Allow for Q & A. Don't be so rigid on time. There is a 20-minute break and I think going 5 minutes into that is ok. We're here to listen to speakers!
- Allow participants to ask all their questions at the end of each session. Don't cut the Q & A session short to get to break on time. Q & A is usually the best/most valuable part of the session.
- Start at 830 AM instead of 8 AM
- Great event – worth the time investment – good to chat with planners/sponsors
- Disappointing. Despite industry concerns the FPA MN continues to promote the sales mentality and assumes all attendees are Ameriprise advisors.
- I wanted to attend Bridge the Gap, and did, but had a hard time missing sessions to do it.
- Thank you for a great conference overall!
- I would like to see more vendors to help build a practice rather than product to sell.
- Thank you for the time and thoughtfulness in putting on the conference.
- Keep up the good work!
- Should refill water on tables at mid AM & PM breaks
- Last year not enough exhibitor time. This year, too much exhibitor time! Especially since weaker exhibitors.
- The projector on stage blocked the view of speakers for many of us in the left side of the audience – isn't there a better way to set up?
- Thank you to the Symposium Committee for so many excellent speakers and topics!
- Where is Nationwide?
- Overall, I felt the speakers and their topics were very weak
- Great Symposium – Need to have the code of ethics in a big room – need to have all of the presentations in the book
- It was a “diversified” line up of presenters...liked the 2 luncheon speakers with a “human” interest flavor...a New Yorker style... charts and style... International style... Took really good care of us!!

- Thanks for a great convention!
- Poor acoustics in Ballroom B for lunch speakers
- The convention center needs to get their AV act together
- Please not on election day in the future
- This was amongst the best conferences I have attended
- Great job MN FPA! Great job Bonnie!
- Great opportunity

Exhibitors:

Rating: 3.33 vs. 3.32 in 2004	4	3	2	1
201 evals	83	103	14	1

- Loved the shoe shine
- Necessary evil
- Great scheduling
- Seemed weaker than last year
- Good variety, friendly, and good freebies
- All good
- Not as many in previous years
- Surprised at low number of exhibitors
- More beverages available in AM and snack in PM as well
- I would enjoy hearing a speaker on probabilistic planning again. I heard the speakers a couple of years ago but would like to hear an updated perspective or “appropriate” planning tools and assumptions.
- Why are they breaking down so early?
- How about 1st America Funds? Gartmore?

Meals, Beverage Breaks:

Rating: 3.40 vs. 3.32 in 2004	4	3	2	1
201 evals	97	90	12	2

- Fruit and celery very good. Would like to see sugar free yogurt for breakfast.
- Thanks for breakfast!
- Thanks for the healthy breakfast
- Very good, but lunch on Tuesday was disappointing
- Great menu! Loved the cheese and celery at breakfast!!
- Gained 20 pounds! Terrific!
- Bottled water! Tuesday lunch – mediocre
- Very well run convention
- It would be nice to have pop, ice, juice and bottled water and cookies on all breaks or water coolers like in previous years.
- Bonnie – Food, room, service, cleanliness, water on table: all excellent!
- Good breakfast
- Don’t like to complain, but lunch Tuesday was not good.

Wine & Cheese Reception:

Rating 3.38 vs. 3.44 in 2004	4	3	2	1
100 evals	44	51	4	1

- Not required/make \$\$ optimal??
- Nicely done
- Past years seemed more vibrant

Meeting Location:

Rating: 3.63 vs. 3.51 in 2004	4	3	2	1
204 evals	138	57	8	1

- All good except for ethics room
- Brighter lights would make it a more academic environment
- Superior to my expectations
- Good
- Ethics room was too hot and too small...

Value for Price:

Rating: 3.45 vs. 3.52 in 2004	4	3	2	1
201 evals	116	72	10	3

- Top notch session
- Geared more toward sale practitioners/sales, not professional CFP's employed by RIA firms

1 I am interested in serving on the Symposium Committee. (No name)

7 I am unable to serve, but have a few hours to volunteer. (Lynn Daly, Linda Kuntz)

4 I would like to work on a one-time project (Linda Kuntz)

ATTENDEE EVALUATION FOR CPE CREDITS

Total turning in form for CPE Cert: 53

	5	4	3	2	1
Were the stated learning objectives met?	17	29	3	1	0
If applicable, were prerequisite requirements met?	19	17	6	1	0
Were program materials accurate?	23	24	4	0	0
Were program materials relevant and did they contribute to the achievement of the learning objectives?	23	20	7	1	0
Was the time allotted to the learning activity appropriate?	20	25	6	0	0
If applicable, were the individual instructors effective?	17	27	3	2	0
Were the facilities and/or technological equipment appropriate?	25	22	2	1	0
Were the handout and/or advance preparation materials satisfactory?	25	22	5	1	0
Were the audio and visual materials effective?	22	20	5	2	0

General Comments:

- Everything was great as usual
- No water was offered @ the coffee tables – that would have been nice.
- Morning pop break missing – prefer Diet Pepsi – breaks too long – should get CPE for all speakers
- When you bring in fairly “heavy” hitters (Evensky, Tibergien) why don't you give them more time... or have a breakfast/workshop” w/ these people to ask questions, etc. I might suggest the other exhibitors not be eligible for the drawings.
- Nice job!
- Great conference – very well sounded – very worth attending
- Great conference
- Outstanding conference again
- The IRS panel didn't spend most of the time on what's new from IRS. Spending too much time on the IRS structure and introducing of the speakers. I want to hear the issues that are relevant to advisors.
- Room 203 for the Options presentation was too HOT! It had to be 80 degrees. – Handouts with graphs should be in color, many of the charts and graphs cannot be related to the keys that describe them since all are black and white.
- Problems with the audio – hard to understand in Ballroom B