

SYMPOSIUM 2007: Planning for Success

Attendee Evaluation – Comments from up to 348 attendees and 93 exhibitors

James Barnash – It’s Just Not About the Money:

Rating 3.05 out of 4.0	4	3	2	1
<i>Tuesday • 256 evaluations</i>				
Program content	66	143	46	1
Presentation	58	152	43	4
Learning objectives met?	75	134	40	5
Materials accurate?	107	122	19	0
Handouts/av satisfactory?	88	143	28	2
Effective presenter?	71	133	46	6
Appropriate time allocated?	77	137	32	2
Facilities/tech equip appropriate?	47	95	61	45
Presentation was:	Basic: 130 Intermediate: 105 Advanced: 10			
How often would you like to hear Jim Barnash speak?	Next Year: 17 Every Few Years: 151 Once is Enough: 75			
How often would you like an update on this topic?	Next Year: 38 Every Few Years: 151 Once is Enough: 45			
Would you like to receive additional information?	Yes: 3 (names below)			
Names:	Lynn Daly, Gary Lage, Tony Shostak			

What did you like most about Mr. Barnash’s presentation?

- The acoustics in the dining room were so poor today that I could not understand much of his presentation
- Emotions that affect retirees
- Good topic
- Last couple of slides on what people want
- Good insights into retirees’ expectations/thoughts
- Very interesting facts
- Materials, study very valuable
- Topic was very appropriate
- Very good; talk is very applicable to my business
- Good data, good slides
- Well spoken, good information
- Documented info – I maybe suspected, but now have hard data
- Research data (4)
- Survey of client goals/fears
- The CE credit
- Stats about retirement (3)
- Excellent!
- Great
- Slides
- Very well organized, good data; effective use of examples and personal
- It was good to hear what clients think about certain issues
- Great; great flow
- Graphics
- Demographics are good
- Good job!
- Interesting info
- Great slides
- Good data relevant to retirement planning
- Brought out some good points on how to help retirees plan for retirement from a psychological view point
- Great research!
- Interesting material – dull – too long
- Great information – liked the research study results
- Process that Ameriprise uses to accomplish “right side” of process. Retirement planning is more than numbers; valuable resource so fee planning is appropriate.
- Focus on the client
- Some great ideas I had not thought of before
- Good information
- Excellent research presented in slides
- Good information and interesting statistics
- I liked the effort to contribute to the thinking about the new front in financial/retirement planning. He had a few good ideas, including actually planning for better health and more family time.
- With Ameriprise, so familiar with materials (3)
- Appropriateness of topic

What suggestions do you have on how Mr. Barnash’s presentation could be improved?

- The meal was not very good nor healthy
- We seemed to be the wrong audience for this presentation; “preaching to the choir” about all topics
- We couldn’t see the words on the screen on the charts
- Sound system was muffled for the first half of the session (2)
- I feel like I’m back in the new-planner orientation class again getting the speech again. Needs more in-depth analysis, not dream book stats (too fluffy)
- Shorten it
- Change the title; seemed to only be about money
- The slides were great, but the handout was difficult to read; colored slides didn’t reproduce well in grayscale.
- Reiterated some of last year’s it seemed. A little general in a way. In a way, feels like Ameriprise is trying to sell us on being an advisor with them. I hate being sold.
- I’m not sure the content was all that dynamic. A lot seemed obvious and I thought there were too many similar slides.
- Lunch presentation needs to be short and light
- Please do not have the lunch speaker in the large ballroom
- The audio quality in this room is horrid! You have to find a different venue for good presentations – like Jim’s. When he fixed his mic, it was much better. Someone on staff should be able to help presenters with that kind of stuff.
- Not the best place for a presentation; bad sound (13)
- Needed more time
- A little long for material covered. The lunchroom is tough to present in due to large size and distractions.
- Same old stuff – delivery could have been better; microphone was rubbing on coat.
- Audio was terrible; food was terrible today
- Too much reading of graphics; would have preferred Jim’s gong “off-script” and telling supporting stories.
- None for Mr. Barnash. He did adjust his mic which improved the audio for the second half of his presentation
- He just read from his slides; great info – need a better speaker
- His voice was difficult to hear from where I was sitting
- Somewhat dry
- Sound system was terrible! Oops, it was mic on his tie.
- More stories, less reiteration of the material on the screen. In other words, what does it all mean to us as FPs and to our clients?
- Ask more questions; give real life examples
- The mic should have been fixed right away; it’s a tough room to hear in anyway.
- Slides were difficult to see and read. (5)
- Better topic – we’ve heard this many times and also seen the statistics. Don’t regurgitate your Ameriprise survey results. What did this have to do with the title?
- I don’t like this room for lunch; seems too big and impersonal.
- Presented a lot of good data – how do we apply the data?
- Mr. Barnash could be a better speaker if he did not read the PowerPoint.
- Don’t talk so much about himself
- Endless, similar slides
- Provide solutions for advisors; we know the problems.
- Audio in this room is terrible; it is very difficult to understand the presenter because of the echo and reverberation in this room. (5)
- This is a difficult venue; PP was difficult to read and handouts in black and white – hard to read the charts.
- Not so much reading of presentation and more ad lib
- Less stats, more stories
- Room too big to use mic w/o having some screening to muffle echo. The acoustics in the room took away from the presentation. Program did not introduce anything new.
- Add value to slides by “asider” over and above reading results
- Too basic
- Focus less on stats and more on practical application
- Reduce your bio to the essentials

Natalie Choate – 100 Best and Worst Ideas:

Rating 3.73 out of 4.0	4	3	2	1
<i>Tuesday • 307 evaluations</i>				
Program content	233	66	3	0
Presentation	232	66	3	0
Learning objectives met?	217	81	5	0
Materials accurate?	255	44	1	0
Handouts/av satisfactory?	235	62	2	1
Effective presenter?	267	33	2	0
Appropriate time allocated?	210	73	13	0
Facilities/tech equip appropriate?	194	85	14	3
Presentation was:	Basic: 13 Intermediate: 173 Advanced: 114			
How often would you like to hear Natalie Choate speak?	Next Year: 142 Every Few Years: 147 Once is Enough: 5			
How often would you like an update on this topic?	Next Year: 205 Every Few Years: 86 Once is Enough: 0			
Would you like to receive additional information?	Yes: 131 (names below)			

Names:	<p>Stacey Ackerman, Lori Anderson, Pierre Asanchev, Kurt Baldry, Doug Barinsky, Aimee Bauman, John Bergstrom, Paul Block, Charles Blossom, Colleen Bollom, Sharon Calhoun, Jovayne Cappa, Ryan Carruth, Leo Carton, Kathy Chen, David Daline, Lynn Daly, Tim D'Amato, Bonnie Denzel, James Donicht, David Dresbach, Ford Droegemueller, Kathleen Elbert, Rick Epple, Brian Farley, Michael Farley, Andy Feterl, Lori Fick, Steve Finkelstein, Joyce Franchett, Johannes Fure, Nathaniel Gehring, James Goedtk, Lori Gubash, Scott Haakenson, Jason Hallonquist, Bridget Handke, Michael Harken, Paul Hassing, Benjamin Hayes, Pamela Heimdal, Bob Hengelfelt, Catherine Holtzclaw, James Householder, Daniel Hovland, Echo Huang, Craig Jergenson, Eric Johnson, Brandon Johnson, Jerry Jordahl, Karin Jordahl, Sharon Jordahl, Mark Keeling, Paul Kinneberg, Charles Klawitter, Gerald Knutson, Michael Kobs, Jerome Kosel, Paula Kozlowski, Ken Kramer, Debra Kuper, Gary Lage, Douglas Last, Robert Lawson, Jonathan Liang, Paul Light, Chris Link, George Loomis, Jim Lund, Jerry Lund, Julie Martinez, Lucretia Mattson, John McEwen, Christopher Meier, Jon Melander, Jason Merritt, Joseph Miller, Buzz Moen, Eric Moleski, Noel Moore, William Moran, Brent Mueller, Eric Munkeby, Michael Murphy, Royce Nies, John Oberg, Rich O'Connor, Jim O'Halloran, Steven Ohm, Cheryl Olivanti, Berthel Olsen, Anthony Owings, Joe Pitzl, Dana Pollard, Jeff Rathmanner, John Rehl, Ron Revier, Michael Ricci, Rod Roath, Jeff Robinson, Linda Roszak, Dean Rotchadl, Lauri Salverda, John Samstad, James Sanders, Robert Saunders, Carol Schulstad, Tonya Schulte, John Schwalbach, Paul Schwartz, Gene Shavlik, Tony Shostak, Mike Shovein, Scott Simpson, Mike Sipe, Michael Snyder, Janet Stanzak, Paul Stein, Adam Stern, Steve Storkan, Gregory Stroh, Tom Taylor, Jeffrey Thorup, John Truckenbrod, Steven Vacinek, Kathryn Vermeer, Bruce Wagner, Rosemary Ward, Kathryn Waters, Nate Wenner, William Wixon</p>
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What did you like most about Ms. Choate's presentation?

- Humorous yet good intent
- Everything (3) was great
- Both style (2) & substance
- Good information (2) and was able to keep the audience engaged
- It was all good – her challenge was to extract only a limited number of ideas/items
- She does not just read us her slides
- Quick effective, informative bullets (not long-winded beat-to-death)
- Presented dry material with enthusiasm, some helpful tips & reminders
- Good sense of humor
- Speaking style – great balance of information, examples (3), stories (2) & humor
- The info on rollovers, Roth IRA's (2) & conversions
- Her personality/attitude
- Style, knowledge
- She gave ideas and examples of situations that I can use with my clients, resources to go for answers
- Wisdom
- Very applicable to my business
- Excellent, current info
- Speaking only – very interesting
- Clear, didn't assume I knew basic info needed to understand a concept
- Very informative
- Entertaining and informative (3)
- Very useable information, thanks for the handouts
- Abundance of information
- Great handouts (2) – well organized
- Clear, humorous, a real pleasure to have her with us
- Useful, timely information, sense of humor
- Provided relevant tips
- Great ideas we can implement immediately, PRACTICAL
- Engaging (3) – explained in a clear manner – hit 'real life' examples – pertinent to clientele
- Comic Relief by an attorney
- Pertinent topics to planning
- I found the material to be very relevant to every day practices, I will consider several ideas for clients
- Complex yet practical material
- The buckets showing distributions
- Content more advanced & relevant
- Great info, humor
- Humor, technical info
- Presentation style & great ideas
- Knowledge of rules/presentation style, outline is great
- Diversity of topics & advanced ideas
- The humor in her presentation
- Entertaining and valuable
- Humorous stories
- Sprinkled humor
- Good presenter (2), speaker
- In depth examples help people understand the concepts
- The explanation of subtleties of IRA Distributions
- Getting a few ideas
- Content was very applicable to my planning practice
- Easy to listen to
- Great review of material, good stories, you go, girl!!
- Very informative, knowledgeable (2), communicated ideas effectively, kept me interested in topics
- Very good
- Practical application – not too basic, not too obscure
- The take home summary of all the points
- IRA issues – these are common planning problems
- The resource "book"

- Focused presentation, not a lot of 'fluff'
- Excellent presentation
- Her personality makes a dry subject very interesting
- The detail
- Very nice outline
- Her enthusiasm
- Great tips – 174! Presented excellent – easy to follow the ideas
- Case examples, variety, clarity, good speaker
- Witty
- Great sense of humor
- Give RMD to Charity counts towards RMD
- It was lively & interesting, she knows her material & shares actionable ideas
- Real life examples
- Dynamic – captured attention (2)
- All! Ideas, knowledge, style, objectivity!
- Very charismatic, enthusiastic about the subject matter
- Very good presentation skills
- Applicable information (2)
- Keeps me sharp
- Humor on a dry subject
- The detailed handouts
- Importance to all
- The relevancy of the topics, it's very timely
- I was thinking she would be very dry; she was very entertaining!
- Her pace was good, she's a clear speaker, she uses humor, and she is readily trying to communicate effective ideas
- She animates the topics she discusses
- Roth discussion
- Examples
- Subject
- Wisdom, expertise
- Her analogies/stories as a lock in for remembering
- Clear expert, some very reliable info, skilled @ explaining complex issues simply
- Common sense ideas
- Enthusiastic presentation
- She is a gem and knows her stuff
- Roth strategies
- Presentation style, easy to follow
- Clear, effective, extremely competent
- Good examples (2)
- Great speaker
- She presented in an easy, fun to understand manner
- Knowledge of topics and her interest in the topic shows
- Speaking manner w/humor, etc.
- Good handouts
- Lots and lots of idea and planning pitfalls
- Topic put in non-tech terms & examples
- She's very good at explaining concepts clearly & giving good, real-life examples
- She was very entertaining – I really enjoyed her presentation
- A little bit of humor, voice was loud and clear, very knowledgeable with examples (Beneficiary choices)
- Knowledgeable, had her facts in order and backed
- Engaging, entertaining, informed & passionate about her subject
- She had good explanations and interpretations of the tax and IRA/QRD laws, very knowledgeable
- Materials were great – many ideas to check out
- In depth applicable knowledge that can be used – Roth, stretch IRA info & estate ideas
- Straight forward info – made it simple for me - good sense of humor
- No notes (for her), No podium, great job
- Her wit & knowledge of the subject
- She adds humor plus current ...rulings
- Content excellent
- Nice mix of knowledge and humor to make an enjoyable presentation
- Good materials even though couldn't cover it all
- Very clear, knowledgeable
- Info I can apply to my practice
- Timely, advanced, very useful tips & clarification of details of rules we use frequently
- Knowledge and presentation style
- Depth of understanding of tax planning issues very credible and a right level of detail. I like the idea of idea of covering a handful of ideas and distributing the rest as a handout
- Her level of knowledge
- Quick, sense of humor, examples, practical
- Her sense of humor was delightful
- Effective, easy to explain strategies
- Fabulous presenter
- Content
- Excellent presentation

- Her delivery is very clean & easy to follow – she has a good sense of humor – good examples
- Content advanced
- She didn't get too complex. She kept it simple and added some humor
- Great skill as a presenter – good humor, good materials
- Her sense of humor and knowledge
- Miss Choate is a good speaker. She is able to present difficult material and keep the attention of the audience
- Practical planning ideas
- Content manner and her ability to keep up on subject matter
- Technical but humorous
- She was a good speaker, added some humor, seemed very knowledgeable
- Excellent info and presentation, really appreciate the handout material
- Her knowledge – her outlook & practicality
- Informative
- Good speaker, good topics though hard to get deep enough on complex topic
- Good planning ideas, she did a nice job of highlighting interesting planning opportunities
- Down to earth examples
- Mixed in some good humor
- Material and explanations

What suggestions do you have on how Ms. Choate's presentation could be improved?

- Good job, terrific
- Pick up the pace, just a tad
- I'd love to get this material on CD or USB stick
- Prefer more complicated Estate/Retirement/Tax issues
- Some visuals (3)
- PowerPoint
- A more summarized version of her top 10!
- No suggestions – great presenter, very knowledgeable
- The many pages of 'ideas' is overwhelming, an outline that we fill in might be helpful for the topics she really wants to emphasize
- She spent a bit too long on some topics
- More advanced concepts
- Short break
- In the presentation materials, define what is meant by 'Best' & 'Worst', one item listed 'Best' was not presented very favorably
- Could use some audiovisuals to back-up key points
- Not to jump around so much
- Don't spend as much time on topics that expire soon or may not have a far-reaching benefit to the audience, i.e. RMD to Charity
- Take a break & then give her more time to talk
- Geared presentation to entry level planners
- Avoid spending too much time on what the rule used to be
- Spend less time on the more basic ideas and more time on cutting edge thoughts/ideas.
- Slideshow (?)
- There should be a break on a two hour presentation
- Less sarcasm
- None at this time, very good presentation
- Some of the ideas were basic – would like more of advanced ideas – overall great presentation. I Love your book – I use it weekly!
- No improvement suggested, speaks clear, knows subject. Thank you for being a great resource.
- I thought it was great
- She's good, no suggestions
- Share advanced material
- Keep on trucking
- Could have spent less time on the charitable contribution from the IRA
- Some slides
- I was disappointed w/ the level of material. I'd expected much more advanced strategies
- Not be the lead presenter of the day, have more props
- None – wonderful. More content w/less stories
- Use some power points – make it stick visually
- Flow chart may be helpful for visual w/ large group
- Add slides
- Can't think of anything
- None, outstanding presenter
- We should at least stand up & stretch after each hour – 2 hours is a long time to sit
- Very good with complex info – Thanks
- No suggestions
- Like her style – Straight at us!!
- More Q & A
- Take less time to explain ideas
- Maybe a little quicker pace
- Such a broad subject, difficult to cover a lot. Notes will be very helpful for future study
- Keep it up!

Economist Panel – David Kelly and Jerry Webman:

Rating 3.80 out of 4.0		4	3	2	1
<i>Wednesday • 216 evaluations</i>					
Program content		192	17	0	0
Presentation		195	15	1	0
Learning objectives met?		188	19	1	0
Materials accurate?		165	26	3	1
Handouts/av satisfactory?		131	41	18	4
Kelly – Effective presenter?	3.87	199	13	0	0
Webman – Effective presenter?	3.70	185	19	1	0
Appropriate time allocated?		161	33	1	0
Facilities/tech equip appropriate?		140	45	3	0
Did you like 2 Econo speakers vs. 3 better?		Yes: 145 No: 20			
Presentation was:		Basic: 13 Intermediate: 96 Advanced: 65			
How often would you like to have a panel presentation?		Next Year: 187 Every Few Years: 10 Once is Enough: 0			
Would you like to receive additional information?		Yes: 87 (names below)			
Jerry Webman	Tom Alf, Brandon Babcock, Douglas Barinsky, Edward Bartholic, Karen Becker-Gemmill, Philip Berg, John Bergstrom, Julie Betchwars, Paul Block, Jovayne Cappa, Ryan Carruth, Leo Carton, Rachelle Chase, Kathy Chen, Lynn Daly, Timothy D'Amato, Paula Doroff(Kozlowski), David Dresbach, Ford Drogmueller, Brenda Gempler, James Goedtke, Scott Haakenson, Jason Hallonquist, Gerald Hansen, Heidi Hansen, Linda Harmon, Paul Hassing, Curtis Hintzman, Katherine Holtzclaw, Daniel Hovland, Timothy Jenneke, Karin Jordahl, Sharon Jordahl, Thomas Karp, Mark Keeling, Paul Kinneberg, Gerald Knutson, Kenneth Kramer, Laura Kuntz, Debra Kuper, Nicholas Kvamme, Gary Lage, Chris Link, James Lund, Jerry Lund, Greg Lyon, Mark Maes, Julie Martinez, Linda Martin-Pope, Lucretia Mattson, Alex Mayrand, Clair McRostie, Norman Mitchell, Michael Murphy, Joe Nelson, Royce Nies, John Oberg, James O'Halloran, Anthony Owings, Dana Pollard, John Rehl, Mark Rekow, Ron Revier, Rod Roath, Anne Russell, James Sanders, Scott Simpson, Fred Sowatzka, Janet Stanzak, Paul Stein, Michael Stern, Thomas Taylor, Jeffrey Thorup, John Truckenbrod, Todd Utecht, Kathryn Vermeer, Bruce Wagner, Ronald Wall, Kathryn Waters				
David Kelly	Tom Alf, Brandon Babcock, Douglas Barinsky, Edward Bartholic, Karen Becker-Gemmill, Philip Berg, John Bergstrom, Julie Betchwars, Paul Block, Jovayne Cappa, Ryan Carruth, Leo Carton, Rachelle Chase, Kathy Chen, Lynn Daly, Paula Doroff(Kozlowski), David Dresbach, Ford Drogmueller, Brenda Gempler, James Goedtke, Scott Haakenson, Jason Hallonquist, Gerald Hansen, Heidi Hansen, Linda Harmon, Paul Hassing, Curtis Hintzman, Genell Hollahan, Katherine Holtzclaw, Daniel Hovland, Timothy Jenneke, Karin Jordahl, Sharon Jordahl, Thomas Karp, Mark Keeling, Ruth Kersten, Paul Kinneberg, Gerald Knutson, Kenneth Kramer, Laura Kuntz, Debra Kuper, Nicholas Kvamme, Gary Lage, Chris Link, James Lund, Jerry Lund, Greg Lyon, Mark Maes, Julie Martinez, Linda Martin-Pope, Lucretia Mattson, Alex Mayrand, Clair McRostie, Mike Miller, Norman Mitchell, Michael Murphy, Daniel Myers, Royce Nies, John Oberg, James O'Halloran, Anthony Owings, Dana Pollard, John Rehl, Mark Rekow, Ron Revier, Michael Ricci, Rod Roath, Anne Russell, James Sanders, Tonya Schulte, Tony Shostak, Scott Simpson, Fred Sowatzka, Janet Stanzak, Paul Stein, Michael Stern, Katherine Stienessen, Thomas Taylor, Jeffrey Thorup, John Truckenbrod, Todd Utecht, Kathryn Vermeer, Bruce Wagner, Ronald Wall, Thomas Walsh, Kathryn Waters, Gary Webb				

What did you like most about the economist panel presentation?

- Knowledgeable, yet humorous
- Good perspective between two; not much redundancy
- David Kelly was very entertaining
- Both brought back to the client level
- Experience, knowledge
- Simple storied, great humor; focus on info we can share with clients
- Highly competent, entertaining and insightful
- The best part of the conference! Both are good speakers & give us excellent information that is important for financial planners!
- Great – RJ is awesome
- These guys are good- keep bringing them back
- Insightful presentations relating the economy and what is going on with it to investing and investment strategies for clients
- Both of these guys are excellent presenters. Keep inviting them back. It would be good to have one more person involved.
- Overall presentation – very helpful
- Good as always
- Only 2 people
- Both excellent
- It answered some of my own uncertainties about the market
- Dr. Kelly and his accent
- Great job, both of you!
- David is a great speaker
- They're very informative
- Great presenters – Good blend of statistics, anecdotal information and humor
- Keep bringing them back!!! They are the best session
- Include foreign bonds in portfolio & intermediate bonds – don't worry about the dollar valuation
- Both men are excellent, knowledgeable presenters
- Excellent
- As always, their arguments are sound
- Awesome

- Everything! Please bring David & Jerry back next year! Very insightful and informative
- Both very good presenters & follow their own strengths & style – very knowledgeable & clear on their recommendations
- Useful info w/humor
- Best segment – as always
- View points, opposing sides of analysis
- David Kelly is very good
- Their ability & tie together difficult facts of the economic picture. Their command of the issues & perspective was impressive
- Different viewpoints – excellent/well known economists
- Confirmation
- Always the best session
- Give us a great idea of where we are & things to w/clients about
- I'm glad you choose just 2 – the 2 best from previous years
- Timely perspective
- Good info presented clearly and w/enthusiasm
- Great
- Great as always
- Current info presented in candid manner – thank you Dr. Kelly & Dr. Webman for returning every year
- Info I can use w/clients
- Very good speaker on extremely important/relevant topics
- Loved it – credible, knowledgeable, with sense of humor – important to have an economist panel at their conference
- Outstanding
- Always my favorite part
- Always great
- One had slides, the other none. I like the mix, both were great!
- Awesome as always
- Everything – great presentation, always great to hear the big picture; like format where they speak and then questions afterward
- Entertaining, yet helpful
- Thank you – very informative & helpful
- Great as usual
- Great speakers
- Frank comments
- Always up to date and from companies that understand how advisors work
- Its good to have just these two vs others in group
- Summary of conditions & expectations

What suggestions do you have on how the economist panel could be improved?

- Would like non-sponsored view point. The Fed people in the past were good, but get someone who is willing to take the whole world perspective. How about a foreign economist?
- Both having high level slides – handout w/bullets would be helpful
- More presentations – for example 1x each symposium day
- Please email the presentation if possible, thanks
- Liked the fed on banks perspective in addition to these 2
- I would love to have Jerry's slides
- Dr. Quincy Krosby – The Hartford
- David Kelly is Hugh Grant!
- Would have liked presentations
- Excellent! Nothing to improve!
- Still the best
- Nothing gets old with these guys
- Panels can sometimes be tough, but their personalities made this succeed. I don't know if there's really anything to improve.
- Invite Dr. Kelly & Dr. Webman for 2008
- While I liked this years format of only 2 Economists with more time a piece, I would like to see 3 next year (& perhaps every other year) to get the diversity of a 3rd opinion
- Missed the fed
- Stats in book
- These guys are great!
- Place in AM or after lunch, 3:00 is a tough hour to listen to such an important topic
- I would have liked to have the political guy from last year – he was great
- Keep it up
- I hour enough

Mary Anne Ehlert – Supplemental and Special Needs Trusts:

Rating 3.66 out of 4.0	4	3	2	1
<i>Tuesday • 65 evaluations</i>				
Program content	47	17	0	0
Presentation	46	17	1	0
Learning objectives met?	45	15	2	0
Materials accurate?	45	17	1	0
Handouts/av satisfactory?	36	12	13	0

Effective presenter?	50	10	4	0
Appropriate time allocated?	36	20	3	6
Facilities/tech equip appropriate?	46	15	1	1
Presentation was:	Basic: 5 Intermediate: 35 Advanced: 19			
How often would you like to hear Ms. Ehlert speak?	Next Year: 26 Every Few Years: 32 Once is Enough: 4			
How often would you like an update on this topic?	Next Year: 24 Every Few Years: 33 Once is Enough: 2			
Would you like to receive additional information?	Yes: 32 (names below)			
Names:	Julie Betchwars, Timothy Brown, Sharon Calhoun, Michael Carpentier, Kathleen Elbert, Richard Epple, Andy Feterl, Nathaniel Gehring, Lori Gubash, Benjamin Hayes, Daryl Johnson, Karin Jordahl, Sharon Jordahl, Cathy Juilfs, Barbara Kirby, Debra Kuper, Robert Lawson, Loren Liesemeyer, James Lund, John McCarthy, Clair McRostie, Mike Miller, Buzz Moen, David Pederson, Jeffrey Rathmanner, Linda Roszak, Lauri Salverda, Carol Schulstad, Kent Schutte, Michael Stern, Rosemary Ward, Gary Webb			

What did you like most about Mary Anne Ehlert's presentation?

- Outstanding in every regard
- Very real life, practical discussion, very easy to understand a complex topic
- Great, plus a need
- Good presentation – great information
- Her energy
- Fast pace, really knew the info
- Entire amount of time packed with useful information
- Info on where to get info
- Knowledge
- Great topic, nice to know some of issues w/these situations
- Fabulous!! Give her more time and a general session slot!
- Passion about a growing issue
- Fantastic!!! Should have been main stage & longer
- Clarity in explaining a complex subject – Great job!
- Special
- Excellent presentation
- Knows her materials
- Interesting, important and difficult subject, too many clients are underserved
- Too the point, good emphasis on pitfalls & basics
- Excellent
- Informative
- Learning hour high. The percentage of general population has disabilities. Hope, importance of asking.
- Great unique topic

What suggestions do you have on how Ms. Ehlert's presentation could be improved?

- Would like more things in handout: numbers
- Chance to cover more material – more time
- Good presentation, but went really fast to fit it in the time slot
- A little bit "Stream of conscious" – Could be a bit more linear to make it easier to follow
- Organize better – cut down on???? "war stories"
- Better supporting handouts would be appreciated
- Handouts need to be more detailed
- More time – She had to move too quickly thru the material
- Needs to be more time allotted for the topic
- Include more technical content in handout
- Poor handouts and visuals
- Too complex, not enough time, minimum 2 hour time needed
- Need more time
- Would like to have presentation slides
- Another hour
- Obviously very knowledgeable – Too much material – too many facts, could talk more generally

Geoff Eliason & David Onan – Intro to Alternative Investments:

Rating 3.34 out of 4.0	4	3	2	1
<i>Tuesday Breakout • 70 evaluations</i>				
Program content	31	35	5	0
Presentation	25	40	5	0
Learning objectives met?	30	27	9	1
Materials accurate?	34	30	3	0
Handouts/av satisfactory?	32	34	3	1
Onan - Effective presenter?	28	38	3	0
Eliason – Effective presenter?	29	38	3	0
Appropriate time allocated?	29	28	9	4

Facilities/tech equip appropriate?	32	28	8	2
Presentation was:	Basic: 7 Intermediate: 40 Advanced: 21			
How often would you like an update on this topic?	Next Year: 36 Every Few Years: 21 Once is Enough: 3			
Would you like to receive additional info? David Onan (21)	Doug Cozad, Scott Flynn, James Goedtke, Scott Haakenson, Jason Hallonquist, Bridget Handke, Curtis Hintzman, Craig Jergenson, Paul Kinneberg, Gerald Knutson, Michael Kobs, Eric Munkeby, Rich O'Connor, Jim O'Halloran, Anthony Owings, John Samstad, Tony Shostak, Clayton St. George, Jeffrey Thorup, Steven Vaciner, Bruce Wagner			
Would you like to receive additional info? Geoff Eliason (22)	Doug Cozad, Scott Flynn, James Goedtke, Scott Haakenson, Jason Hallonquist, Bridget Handke, Curtis Hintzman, Craig Jergenson, Jerry Johnson (symbols for funds), Paul Kinneberg, Gerald Knutson, Michael Kobs, Eric Munkeby, Rich O'Connor, Jim O'Halloran, Anthony Owings, John Samstad, Tony Shostak, Clayton St. George, Jeffrey Thorup, Steven Vaciner, Bruce Wagner			

What did you like most about the presentation?

- Innovative
- Good content
- Timely info
- Great info, good charts
- Introduced me to areas that are new, yet appropriate
- New concept introduced
- Good
- New content for me
- Didn't know much about Fundamental Indexing or difference in performance between avg investor & Institutional Indexing
- Great overview
- Introduction to alternative investments for the tactical portion of our client
- Well done, smart, concise
- OK
- Charts
- Good alternatives
- Complexities
- An interesting way to think about investments
- Eye opening – this is information that I will consider implementing with client
- Something that is new to industry so great to hear about
- Good explanations

What suggestions do you have on how the presentation could be improved?

- Better explanation
- Too technical & statistical vs emotional, too much data/each spoke too quickly
- Bigger room
- More time for the fundamental indexing info
- Geoffry did not talk about Alternative Investments but indexes, probably should have been 2 classes not one
- Room was too crowded
- None (3)
- Would like more info on developing a portfolio using alternative investments
- More in depth information
- Can it be included in wrap accounts? Limitation in invest side
- OK
- Could give more time
- More depth – explain each class in detail
- Slides didn't all match materials, some slides not in materials, all slides should be in materials; hard to follow the speaker at times – were too fast for me, couldn't follow with some chart explanations
- They could easily have used another hour
- More time; be able to read slides, moving so fast – missed some key points
- Less sales pitch

James, Jennifer – The Adaptive Leader

Rating 3.59 out of 4.0	4	3	2	1
<i>Tuesday Breakout • 261 evaluations</i>				
Program content	165	68	22	5
Presentation	180	58	20	2
Learning objectives met?	136	77	38	6
Materials accurate?	137	80	25	3
Handouts/av satisfactory?	100	91	50	9
Effective presenter?	198	47	12	3
Appropriate time allocated?	153	77	25	5
Facilities/tech equip appropriate?	137	92	14	0
Presentation was:	Basic: 61 Intermediate: 108 Advanced: 71			
How often would you like to hear Jennifer James?	Next Year: 79 Every Few Years: 118 Once is Enough: 59			

How often would you like an update on this topic?	Next Year: 82 Every Few Years: 120 Once is Enough: 46
Would you like to receive additional information?	Yes: 80 (names below)
Names:	Brandon Babcock, Douglas Barinsky, Philip Berg, John Bergstrom, Jullie Betchwars, Charles Blossom, Colleen Bollom, Dana Brewer, Leo Carton, John Chaya, Kathy Chen, Lynn Daly, David Dresbach, Ellen Dubuque, Kathleen Elbert, Ann Etter, Tom Evans, Johannes Fure, Nathaniel Gehring, Richard Gluck, James Goedtke, Scott Haakenson, Marc Hadley, Jason Hallonquist, Gerald Hansen, Mike Harken, Daniel Hovland, Beverly Huber, Craig Jergenson, Karin Jordahl, Jerry Jordahl, Sharon Jordahl, Mark Keeling, Paul Kinneberg, Charles Klawitter, Michael Kobs, Jerome Kosel, Kay Kramer, Ken Kramer, Laura Kuntz, Debra Kuper, Gary Lage, Robert Lawson, Steve Lear, Loren Liesemeyer, Peter Ludwig, Julie Martinez, Dean Maschka, Lucretia Mattson, John McEwen, Marianne Merriman, Norman Mitchell, Buzz Moen, Noel Moore, Eric Munkeby, Tim Munkeby, Daniel Myers, Royce Nies, Joseph Pitzl, John Rehl, Mark Rewok, Nicole Rosandich, Joan Rossi, Anne Russell, Tonya Schulte, Gene Shavlik, Tony Shostak, Barbara Skochil, Janet Stanzak, Michael Stern, Lee Stoerzinger, Todd Utecht, Kathryn Vermeer, Eugene VonMosch, Ron Wall, Rosemary Ward, Bruce Wagner, Karen Weathers, Nate Wenner, Donald Wright

What did you like most about Jennifer James' presentation?

- Education, eclectically, entertaining
- Subject that were outside of normal financial subject
- Very energetic
- Super guest, would think she'd be a great dinner guest
- It takes us out of the "current state" with blinders on
- Entertaining, thought provoking, interesting, great speaker, engaging; seemed the info in our book did not match presentation
- Free formed, yet controlled
- Good ideas
- Amazing presenter! Her viewpoints, thoughts, ideas and information were eye-opening. Thank You!
- Excellent – very timely & valid – great examples
- Out of the box thinking; she was right-brained which is refreshing
- Very interesting
- She may have had a good message, but I was bored within 10 minutes, so for me, I had to endure 50 minutes day dreaming – which I am not here for
- Awesome speaker with a very important message to open our minds and help us think differently!
- Content and presentation style
- Interesting to see world politics, technology, and economy through the eyes of an anthropologist
- Very passionate & humorous
- Made me think – a little different than what we deal with daily
- Out of the box, different yet very, very interesting; loved her talk
- New wisdom traditions
- Her humor and lecture style – using her hands to communicate
- Thought provoking, humorous, excellent overview of what humans need to be aware of; also, her insight gives one hope that we (the world) can muddle through & get a new vision; a wonderful piece for these 2 days
- RIGHT BRAIN – nice to give the left brain a break on financial for an hour
- Excellent presenter – great information – usable – entertaining
- Introspective material, excellent synopsis of "Pondora's box" and how most Americans are resistant to change; embraces diversity
- Different ideas – consider new ways to look at issues
- Everything (2)
- Ideas I've never considered
- Amazing perspective
- Excellent change of material and pace from other presenters
- Timeline of change example
- Very interesting subject matter; very knowledgeable on subject matter; excellent presenter, animated, humorous
- Things I'm not exposed to
- A view from a different perspective; created perspective on financial planning
- Great presentation, great thinking!
- Fabulous!
- Thought provoking (2)
- Information on academia
- The topic; love it
- Very engaging
- Great presentation – thank you! (2)
- Humor (3)
- Great to have a speaker like her at the conference vs. all "financial talk"!
- Challenge to my thinking and norms
- Very real – intuitive and insightful
- Different than the other presentations
- Very interesting
- Great use of humor to make her points
- Very refreshing and thought provoking! Love this topic about thinking globally and improving cultural understanding
- Terrific! Insights about cultural change and how to look to the future. Liked the reading list slot.
- Great – need more time to get into application of the topic
- Insight in why the world's view is changing and issues resulting in US view lagging behind
- Awesome – thank you!
- Excellent (3)
- The subject
- She's fabulous
- Great, interesting!
- Terrific, perfect timing after two hours of tax

- Her intelligence
- Intriguing
- She was great! (2)
- Great job!
- World changing insights
- Her passion for subject
- We need more of this type of information
- Everything; touched a core of self
- Fascinating. Thank you for bringing her!
- Blindingly liberal propaganda disguised as a workshop with doses of observational fact thrown in
- The whole thing, very provocative
- Interesting, new, thought-provoking
- Enlightening, interesting, entertaining
- In a business of exact numbers and IRS and government oversight, it was good to hear other concepts to get another view on balance in our society
- Clear, extremely insightful and thoughtful
- Stimulating and challenging, provocative
- Humor; great to have different perspectives and different topics
- Good sense of humor on some things...
- Nice change of pace for a top down cultural expertise
- Made me think about the future
- Great!!
- Reality and scary at the same time
- Diane Keaton!
- The hands! She gives a much needed different perspective
- WOW!
- Think outside the box
- One of the best speakers I've ever heard
- Interesting topic; fun speaker
- The topic is fascinating
- Examples
- Good insights into cultural change
- Her wit and insights
- All of it; I love the social science slant; more wisdom than most "left brain" understand
- Presentation skills are excellent. Extremely educational and thought-provoking. A subject I am now motivated to learn more about.
- Good points about society and change; entertaining and intelligent
- Very thought provoking, excellent presentation

What suggestions do you have on how Ms. James' presentation could be improved?

- Interesting but would have been much more effective making at least ½ session tied into impact in our business & what to do more clearly
- None; no improvement needed (5)
- Her subtle politics were not so subtle
- Apply to industry; how do we use this info to keep up?
- Best speaker in years!
- Weird; cut to the chase
- Speak more clearly – couldn't understand some (30%); sat in front
- Visuals – I'm a visual more than an auditory learner
- Nothing; great subject to hear about
- Better materials
- I would have preferred better handouts; wonderful content, but I'd like to take it home
- She rambled; I liked it, but it was all over the board!
- Instead of covering such breadth, hit a few areas more and draw specific conclusions or applications
- Make more points; tie in info to a point; helps with direction
- Seemed interesting and highly intelligent, but I didn't take anything away from it
- She looked like she should have been in a Woody Allen movie
- Ms. James was shamefully liberal. In her attempt to tell us about our "fears," she exposed her own. Her bias tainted her education and she lost all her credibility with her politics. She has a good message, but will lose that that need it the most.
- I sat in the back of the room. I had difficulty understanding her. Perhaps this was due to her speech pattern – up and down in volume.
- Ms. James presented her material well. She is obviously well-educated in her specialty. But, it also appears that she is socialistic and atheist or at least has that world view. I do not believe this source of instruction compliments the view of the majority of us. I believe there is an ultimate truth to live by and for. I don't feel good about a message that basically says my faith is mythology.
- Nothing, she did great!
- Conclusion – which would probably be prediction (and hypothetical) and therefore, only speculation
- Perhaps that recognition of some values as moral and perhaps superior
- Relate it more to financial planning; went off on tangents and had a hard time coming back
- She needs to state her objective of her lecture; what is she trying to teach us, show us? Need to leave time for Q&A
- A bit too much on muslow
- Not sure what the learning objectives really were (?); big leap between our profession & her discussion (Don't get me wrong, I really liked it, but it was really a speaker I'd expect to see at an academic class or on MPR
- Bring you own mythologies and pre-dispositions into play. How has the shaped the way you lead, how you work, and your outlook on the past and the future; materials not so relevant to what was spoken
- Leave more time (or give her more time) for questions
- Too general

- Not sure how it related
- Wrong crowd – make it more applicable to the crowd
- Had trouble following her sequence
- Would like the handouts to outline what she discussed, we get so much in these 2 days – It’s nice to look back later to refresh our overloaded brains
- Topic covered is important, but lacked practical relevance and she did not build many bridges to your practice and activities going forward into the future
- Didn’t see the tie-in to leadership
- I thought it would be more about being an adaptive leader w/ specifically our industry; I enjoyed the presentation – but think the title didn’t represent it
- More time (6)
- Include muslow hierarchy
- Her use of her hands was very distracting
- A little more specific with regard to the financial planning industry

George Johnson – 7 Entrepreneurial Skills:

Rating 3.36 out of 4.0	4	3	2	1
<i>Tuesday • 117 evaluations</i>				
Program content	65	40	5	0
Presentation	67	35	4	0
Learning objectives met?	63	41	4	1
Materials accurate?	66	38	6	0
Handouts/av satisfactory?	56	41	12	1
Effective presenter?	76	33	3	0
Appropriate time allocated?	66	34	7	2
Facilities/tech equip appropriate?	64	41	2	1
Presentation was:	Basic: 45 Intermediate: 48 Advanced: 6			
How often would you like to hear Mr. Johnson speak?	Next Year: 39 Every Few Years: 52 Once is Enough: 14			
How often would you like an update on this topic?	Next Year: 35 Every Few Years: 49 Once is Enough: 9			
Would you like to receive additional information?	Yes: 28 (names below)			
Names:	Gabriel Asebedo, Kathy Chen, John Conlin, Lynn Daly, Larry DeGraaf, Randy Doroff, Richard Epple, Jason Hallonquist, Mike Harken, Eric Johnson, Brandon Jones, Karin Jordahl, Sharon Jordahl, Cathy Juilfs, Paul Kinneberg, Paul Light, Chris MacBean, Norman Mitchell, Noel Moore, Eric Munkeby, Timothy Munkeby, Dana Pollard, Lauri Salverda, Michael Sipe, Bruce Wagner, Rosemary Ward, Kathryn Waters, Donald Wright			

What did you like most about George Johnson’s presentation?

- Practical application
- Spot on!!
- Good Ideas
- The quiz
- Interactive! Made us think about our future, and strengths. We need to hear this often – although we know we need to plan – we don’t always do it!
- His enthusiasm
- Interactive
- Good interactive
- Very interactive
- Excellent focus on individual strengths
- Interaction was perfect
- I liked the interaction & having each of us take a step back to look at ourselves to better understand our strengths
- Everything was great!
- Exercises with a partner
- It was different
- Appropriateness
- Usable/accountable
- Made me think about vision
- Enjoyed hearing more about 7 skills, very good topic, Best hour!
- Met a great new individual
- Good interaction in the group
- The topic
- Motivation, presentation
- Interaction

What suggestions do you have on how Mr. Johnson’s presentation could be improved?

- No it was great
- More “proof”
- No improvement needed. Great job
- Would like greater detail
- In 1 hour, he has us exchange stories too many times

- Would love to hear more from George – What can we do to live w/7 Entrepreneurial skills More time needed?
- More time
- This one needed 2-3 hours, not 1 hour
- Did not like audience participation – would rather listen & be motivated & educated

Joe Jordan – Living a Life of Significance:

Rating 3.67 out of 4.0	4	3	2	1
<i>Tuesday • 295 evaluations</i>				
Program content	171	107	10	0
Presentation	230	49	8	0
Learning objectives met?	173	85	25	1
Materials accurate?	190	80	15	1
Handouts/av satisfactory?	189	87	10	1
Effective presenter?	259	30	1	0
Appropriate time allocated?	210	60	11	3
Facilities/tech equip appropriate?	219	62	8	1
Presentation was:	Basic: 122 Intermediate: 109 Advanced: 22			
How often would you like to hear Joe Jordan speak?	Next Year: 71 Every Few Years: 151 Once is Enough: 48			
How often would you like an update on this topic?	Next Year: 75 Every Few Years: 144 Once is Enough: 30			
Would you like to receive additional information?	Yes: 77 (names below)			
Names:	Lori Anderson, Sandra Anderson, Pierre Asanchev, Chad Babcock, Kurt Baldry, Ronald Bardine, Philip Berg, Julie Betchwars, Sharon Calhoun, Ryan Carruth, Leo Carton, John Chaya, Kathy Chen, Lynn Daly, Kathleen Elbert, Michael Farley, Lori Fick, Steven Finkelstein, Johannes Fure, James Goedtke, Lori Gubash, Scott Haakenson, Jason Hallonquist, Heidi Jo Hansen, Mike Harken, Paul Hassing, Benjamin Hayes, Curtis Hintzman, John Hinz, William Hoefer, James Householder, Daniel Hovland, Echo Huang, Craig Jergenson, Jerry Johnson, Karin Jordahl, Sharon Jordahl, Cathy Juilfs, Mark Keeling, Paul Kinneberg, Gerald Knutson, Debra Kuper, Gary Lage, Robert Lawson, Brad Leiverman, Julie Martinez, Lucretia Mattson, John McEwen, Christopher Meier, Ramona Michaels, Buzz Moen, Eric Moleski, Noel Moore, Michael Murphy, Royce Nies, Rich O'Connor, James O'Halloran, Steve Olsonoski, Anthony Owings, Dana Pollard, John Rehl, Ron Revier, Michael Ricci, Lauri Salverda, James Sanders, Alan Scherer, Jeff Sessions, Michael Sipe, Fred Sowatzki, Adam Stern, David Thesing, John Thomas, Jeffrey Thorup, Bruce Wagner, Ronald Wall, Rosemary Ward, Karen Weathers			

What did you like most about Mr. Jordan's presentation?

- Remembering the why behind what we do!
- DVD clips
- Doing the right thing for clients, emotional
- Joe is wonderful!
- Presentation effectiveness
- Passion (6)
- Simple, concise, excellent
- Remind me what my job is
- Enthusiastic – good speaker
- Very passionate
- Passion about doing the right thing
- Really believes in his purpose & work & relays that
- Personal – relevant
- Wonderful speaker – with passion
- Great visuals
- "Spot on!"
- Highly entertaining!
- High energy
- His passion for the life business w/out being too 'preachy'
- Passionate impact
- Delivery & videos
- Passion, he was real
- He sent a good message about our moral obligation to help
- Very entertaining, good use of video got into the right side of my brain
- Great speaker (2)
- The humor and the right brain reminders
- Videos made it easy to feel the emotion
- Very nice speaker
- Excellent job of translating to real life
- A very nice message about what matters most in life; I thank him for being open about himself
- Excellent presenter – engaging – good information
- Great energy
- He was great!
- Human, client examples, vigorating, motivational, good use of technology
- Life planning
- Passion and sincerity

- Got to the heart of what the business is about on a basic level
- Reminded me of the important, emotional side, of our business
- Good speaker (2)
- Real life
- Funny
- Humor, passion, message
- Sincere presentation with a great perspective
- Stories/video/message
- Passion in his profession
- Videos to compliment presentation
- Real!
- Easier to listen to after 2 hours of RMD planning
- Serious issues w/LTC planning
- Great! I'm in tears
- Entertaining, good presenter, touching video some great points
- Great seminar about why we are in the business. Loved the fact that it was from the heart
- Very dynamic – Have Joe back
- Emotion and ethics of serving clients is very, very important
- Enthusiasm & message
- Great motivational speaker
- Combo of presenter & DVD's
- Videos were helpful variety
- Sense of humor and the thought of what is right for the client
- Great enthusiasm
- Everything! This was an amazing presentation!
- Effective use of videos
- A little preachy & basic – good stats
- His delivery
- Motivation & applicable to life & practice
- Entertaining & compassionate and passionate
- Motivational
- Heartfelt (2)
- Compelling approach to presenting
- Expression of a moral obligation within our profession
- His humor
- His energy, his compassion, his effort
- He stressed being an advocate for your clients. I'm tired of clearing up messes that salespeople make for them who becoming clients
- Passion/personal
- Great presentation
- This is just the 2007 version of the same old life insurance pitch
- Video footage/personal touch
- His emotional delivery!
- Personal insights
- Effective – funny
- Good speaker
- Videos – good speaker
- The conviction
- His experience & passion
- Energy
- Great videos
- Conviction & emotion – really brought personal experience to the table
- Entertaining, funny & informative
- Enthusiasm, message, video clips
- Use of video presentation within his speech
- The humor element
- Powerful voice and speaker – slide show was great, this guy is really good
- Knowledgeable, good points, entertaining
- I think planners are good advocates – too basic. Better suited Insurance 101
- His passion for the industry was apparent
- Passion, reemphasis on our problem solver rock
- Entertaining – great message
- Left brain – right brain reminder
- His style and his focus on the moral dimension of responsibility
- Everything
- Powerful speaker
- Effective presenter, great examples & videos
- The use of real world experiences helps connect the issue to the audience
- Emotional presentation
- The essence of what we do & why those became very clear
- Matter of fact info. Basic, but effective 0 liked the emotional connection
- Charismatic of why we do what we do – 'simple'
- His humor in delivering a very important message – live a life of significance!
- Use a laser beam pointer – sometimes I couldn't tell where he was pointing – don't run to shows
- Emotion – right brain/left brain approach – video really added value – stupendous

- Videos, examples, passion
- Videos with personal stories are outstanding
- Fabulous job with technology & video clips effective
- His passion and conviction
- Entertaining, always good to hear a basic message
- Vibrant speaker
- Outstanding
- Simply great! Riveting!
- Effective, emotional present
- Pace, emotion, passion
- Charismatic & articulate speaker
- His passion – excellent job
- His approach on “humanizing” the little insurance service & products, good use of video, multi-media
- Powerful
- Inspirational
- Kept my interest
- Message, quotes
- It was real down to earth
- His ability to simplify & directly address complex issues
- Entertaining, good focus on the results of what we do
- Emotion
- Very entertaining & good content

What suggestions do you have on Mr. Jordan's presentation could be improved?

- Maybe one less video clip – Although they were all very good
- Give him 30 more minutes
- I felt this was a “typical” presentation of a Life Insurance Co. as to why their sales people should sell Life Insurance & annuities – need more on planning
- Did a great job
- I like many of the conclusions and examples, however to close the presentation “selling” and “pity” is just what we are here to do. Being an advocate is an appropriate means for providing insurance
- Very well done, Thank You!
- Acknowledge the problems created by Insurance Companies
- Would have appreciated knowing the insurance bent in advance of the presentation
- Longer time slot
- Speak more about living a life of significance – touched on moral obligation of planners to help those who need... hammer point home – lower & middle class
- No improvement needed; continue to be yourself
- I felt like I was being sold on annuity/life insurance. Speak to my left brain, not just our emotions
- Push for higher ethics of low quality, high cost annuities
- How to turn assets into income strategies
- More detailed solutions
- Publish a book, etc.
- Too many videos! Seemed as though the entire session was convincing the participants selling insurance was “ok” or morally on obligation
- I like the program but the title was bait and switch! How much more could have been said about “Living a Life of Significance”
- Just keep doing what he does! Excellent!
- He should be more energetic
- He did well with his topic(s); I just think personally I would've like more content – I'd like to have learned more about life insurance itself rather than focus on the right-brain emotional tug
- Put him first in the day
- Too basic – insulting to suggest an experienced planner doesn't deal with feelings/reality
- More concrete suggestion on how to be significant in other's planning
- Too vague – detail given against investments but not for annuities
- Great as is!
- Balance presentation/heavy handed
- Better technology needed to queue up the videos – they were very impactful in his presentation; the delay hurt that
- Maybe add more Q & A time
- Some things went by really quickly
- Good focus on the emotional side of what we do and not getting hung up on the numbers. Too heavy on the emotional side, it's a balance. Insurance companies need to show how they're efficient at delivering their products.
- Living a Life of Significance – misleading to actual topic

Keith Loveland & Matt Boos– FPA Ethics Course:

Rating 3.55 out of 4.0	4	3	2	1
<i>Tuesday Breakout • 146 evaluations</i>				
Program content	85	51	7	1
Presentation	91	42	9	0
Learning objectives met?	92	42	8	0
Materials accurate?	88	40	10	1
Handouts/av satisfactory?	74	51	14	1

Loveland- Effective presenter?	3.60	104	34	4	0
Boos- Effective presenter?	3.63	106	34	2	0
Appropriate time allocated?		88	51	8	1
Facilities/tech equip appropriate?		81	52	5	0
Presentation was:		Basic: 14 Intermediate: 82 Advanced: 39			
How often would you like to have an ethics presentation?		Next Year: 90 Every Few Years: 39 Once is Enough: 3			
Would you like to receive additional information?		Yes: 33names below)			
Names:	John Bergstrom, Charles Blossom, Ryan Carruth, Leo Carton, Kathy Chen, Lynn Daly, Ford Droegemueller, Steven Finkelstein, Gerald Hansen, Scot Hanson, Daniel Hovland, Echo Huang, Bradley Jenson, Wanda Johnson, Charles Klawitter Peter Ludwig, Lucretia Mattson, Norman Mitchell, Noel Moore, Royce Nies, Dana Pollard, Ron Revier, James Sanders, Robert Saunders, Alan Scherer (had to leave early, results of court case), Ronald Semon, Barbara Skochil, Paul Stein, Alan Stern, Susan Stiles, Gregory Stroh, John Truckenbrod, Kathryn Waters				

What did you like most about the Code of Ethics presentation?

- All
- "Real Case" scenario
- Convenience
- It was a good idea to work us through a "real life" example, but Keith jumped into the meat and potatoes so quickly that it stopped all discussion
- It made me think
- Entertaining & educational
- Case study (3)
- Opportunity to interact/discuss with colleagues
- Common sense approach – great moderating
- Thought provoking
- Pertinent info excluded...intentionally
- Discussion
- Great presentation/case study
- Interesting case presentation, great presentation and good participation from attendees
- Good to spend time on a case study (2)
- Interesting instead of boring, case study format is great
- Credits
- Very knowledgeable, interesting content
- The Real Life situation that was presented helped with the understanding of the arbitration process
- Doing it via case study and interaction
- Case of understanding them
- Format
- Excellent course
- Participation
- Knowledge & presentation style of presenter
- Liked the format, but...
- Good case study
- Good interaction & role play with the case
- Made me think of things I can do to tighten up my practice & as always Keith makes the topic enjoyable to sit through
- Role playing in a real life case scenario
- Necessary topic, some sloppy detail in the case, after the fact – seeing that it was "planned"
- Good content
- Good information about arbitration; interesting facts and interesting case
- Real life (2)
- Interactivity
- Format was excellent
- Interactive format – great
- Interactive & informational
- Interactive, case study approach best way to learn
- Engaging format for discussion
- Good case – pertinent points
- Actual case makes it more relevant
- I liked the case format, It was the best Code of Ethics class I've been to – very interesting
- The interactive part of the session was fun
- Break time poorly managed
- Very practical application that involved the group
- Engaging
- Interesting case – well presented
- Leaving out the sticky details
- Case study was good idea
- Good each year

What suggestions do you have on how the presentation could be improved?

- Case details need a clean-up (i.e. Brokerage Acct v. Discretionary Brokerage) (or "Direct in Mutual Funds", but if so, why would B.D. be mailing our prospectus?)
- Be more organized on the order of events, Keith & Matt had so much knowledge for us, and too much time was wasted
- It was really wonderful

- More material on how it relates to our business practice on a day to day basis, ways to incorporate in our business
- Excellent presentation
- Great format-finally!
- Case study on low to mid net worth clients, I do not have clients with real high net worth
- Keith could speak a little faster, case needs more details
- Disappointed it was the same case as last April - !
- Change case more often
- No suggestions
- More time needs to be spent on this subject, things in the area of compliance are changing quickly
- Too long
- None (4)
- Nothing at this time (2)
- This is the same case used last year – very disappointing given my high expectations of Keith and Matt
- I don't think we needed to spend too much time on 1 case, I would've preferred going quicker though maybe 3-4 case studies
- Poor time management – too much of a basic
- Hard to say
- ... would have liked to cover 2 cases, spending about half as much time in the work groups
- Case material could be organized better, more lecture (content); less discovery (blind leading blind)
- Would like to hear tips on how a rep can protect him/herself re: client notes, IPS, etc., would be interested in studying a more general case that we may run into more frequently in "real life"
- No new information, disappointed – too much time for this topic
- Add more vital info to the case study, not enough info to help us
- They seemed to leave a lot of facts out of the case study, seemed like the same case study as last year (copy of 2005)
- Way too long for small group discussion
- Get a new example for the case, more current
- I don't believe the "large case study" format worked very well, short real world examples may have worked better
- Focus on how we as advisors can best protect ourselves & our practices
- Cover more in the time – too long discussion period, more issues
- Keep doing it this way – very engaging
- Better overview, better case facts, too much was left out to make it meaningful to study, everything was speculation

Karen Palm – Entity Choices:

Rating 2.80 out of 4.0	4	3	2	1
<i>Tuesday • 74 evaluations</i>				
Program content	21	38	6	1
Presentation	24	28	12	1
Learning objectives met?	20	32	10	2
Materials accurate?	30	24	10	0
Handouts/av satisfactory?	9	28	22	4
Effective presenter?	27	27	9	1
Appropriate time allocated?	19	36	7	2
Facilities/tech equip appropriate?	23	31	6	3
Presentation was:	Basic: 25 Intermediate: 41 Advanced: 3			
How often would you like to hear Ms. Palm speak?	Next Year: 8 Every Few Years: 40 Once is Enough: 15			
How often would you like an update on this topic?	Next Year: 13 Every Few Years: 45 Once is Enough: 11			
Would you like to receive additional information?	Yes: 10 (names below)			
Names:	Julie Betchwars, Sharon Calhoun, Michael Carpentier, Kathleen Elbert, Scott Haakenson, Karin Jordahl, Sharon Jordahl, Gerald Knutson, Buzz Moen, Bruce Wagner			

What did you like most about Karen Palm's presentation?

- Anecdotal
- Open and honest
- Down to earth, practical benefits of her own experience – not just fancy bells and whistles
- Experience showed
- Knowledge & expertise
- Very knowledgeable
- It's practical information that we don't usually work with directly
- She was direct & clear
- Not much
- Really like it
- Kept it moving
- Concise
- Discussion regarding eligible "expenses" for various entities & liability discussion
- Good refresher
- Very good presenter
- Friendly manner
- She talked about all entities and some of the issues with each

- Good overview
- Very knowledgeable
- Great information

What suggestions do you have on how Ms. Palm's presentation could be improved?

- Actual example/case studies
- Good information, it could be longer because she has a lot of good info. Very knowledgeable on subject!
- Have all slides in handout
- Speak louder, maybe slower
- Room was too small... crowded, should use mic, She is loud but with full room harder to hear
- Presentation was too Minnesota-specific, which had not been identified ahead of time
- Having your "extra" slides would have been good (to take notes on)
- Use a microphone
- Ask if there are an EA's in the room
- Expanded handout w/narrative
- More practical details on each entity type when to chose, i.e., home, office, tax planning. Some of the statements on payroll taxes seemed somewhat misleading or at least confusing to me, i.e. guaranteed payments
- Spoke too fast
- Put all slides into the handouts
- A bit hard to hear from the back
- More real life examples; info is kind of dry by itself

Retirement Income Planning Panel – Caroline Emswiler, Craig Jergenson, Larry Pohlen, Janet Stanzak:

Rating 2.90 out of 4.0		4	3	2	1
<i>Wednesday • 239 evaluations</i>					
Program content		47	124	58	5
Presentation		38	126	65	5
Learning objectives met?		39	124	59	8
Materials accurate?		44	129	43	6
Handouts/av satisfactory?		23	91	60	40
Emswiler - Effective panelist?	2.85	54	128	40	1
Jergenson - Effective panelist?	2.87	49	126	56	1
Pohlen – Effective panelist?	2.95	49	138	47	0
Stanzak – Effective panelist?	3.07	77	114	39	5
Appropriate time allocated?		54	117	48	13
Facilities/tech equip appropriate?		64	122	36	2
Presentation was:		Basic: 110 Intermediate: 98 Advanced: 6			
How often would you like to have a panel presentation?		Next Year: 53 Every Few Years: 106 Once is Enough: 47			
Would you like to receive additional information?		Yes: 26 (names below)			
Emswiler	Ted Bourne (slides), Leo Carton, Lynn Daly, Brenda Gempler, Gerald Hansen, Sharon Jordahl, Paul Kinneberg, John McEwen, Brad Middendorf, Norman Mitchell, John Rehl, Ron Revier, James Sanders				
Jergenson	Leo Carton, Lynn Daly, Brenda Gempler, Scot Hanson, Gerald Hansen, Paul Kinneberg, John McEwen, Brad Middendorf, Linda Martin-Pope, Michael Ricci				
Pohlen	Ryan Carruth, Leo Carton, Lynn Daly, Brenda Gempler, Gerald Hansen, Paul Kinneberg, John McEwen, Brad Middendorf, Linda Martin-Pope, John Rehl				
Stanzak	Charles Buck (overheads), Ryan Carruth, Leo Carton, Kathy Chen, Lynn Daly, Ellen Dubuque (outline), Brenda Gempler, Scot Hanson, Mark Keeling, Paul Kinneberg, John McEwen, Brad Middendorf, Royce Nies, James O'Halloran, Linda Martin-Pope, John Rehl, Mark Rekow, Rod Roath, James Sanders, Greg Stroh				

What did you like most about the presentation?

- Good common sense answers & ideas – actionable & repeatable processes
- Good variety of inputs
- Had potential, but turned out flat
- I am happy to hear from peers how they are managing portfolio's to create income & manage client cash flow
- Really liked Caroline's discussion of the three retirement income planning studies
- Experience
- Got to see other planners view points and how they work with their clients
- This is such an important topic; I would have liked to have seen a specialist (like one of the authors mentioned); I look forward to hearing more on this topic next year at this event
- Great topic but...
- Good concepts
- It is good to get views from different
- It's interesting to see what others are doing & how many different ways there are to do the same thing
- Important topic
- Panelists candor in answering questions; sources of research

- Good discussion of different real-life practice styles & ideas
- Good information
- Peers speaking
- Info on withdrawal rates (2)
- The CE credit
- “Sample Platter” of experiences
- Variety (3) of info & approaches
- Good info on research of rate of withdrawal info
- How four successful people do the same job differently & yet completely (?)
- Confirmed much of what I am doing; good communication w/clients is essential for both client & advisor
- Thanks for the apple cider, it was great
- The idea is fine, but this group...not so much
- Thank you to the presenters for taking the time to discuss these issues
- Appreciate people sharing what they actually do – how we’re all applying all this information
- The diversification of the members
- Good information; it was nice to receive a variety of perspectives regarding the issues clients face
- Janet’s info good; thanks to all presenters
- Retirement Distribution ideas
- Hearing how advisors talk to their clients
- Differing viewpoints
- Hearing the different perspectives (2) from actual practitioners
- Questions
- Different business models & each panelists handled a separate question
- The questions were great
- A lot of knowledge and history
- Honest
- Talented panel
- Four normal people who value their job and are passionate about what they do
- Important conversation/topic...& will be increasingly important & complex in next 30 years
- Nice to get a variety of opinions and practices
- Practitioners – real world perspectives
- Varied backgrounds of the presenters
- Craig – Do you use Ray Lucia’s “Buckets of Money” software?
- Subject matter
- Candidness, sharing their strategies and willingness to be open with their peers
- The different views and ways of planning with clients based on various planning strategies was interesting
- Withdrawal rate info was very informative
- Personal examples of how they do things
- Different perspectives on retirement withdrawal strategies
- Having people who worked in this business talk about what they do
- The fact that you had people from different backgrounds all about issues we all face
- Nice mix of information
- Janet’s av presentation good
- Poor use of my time – much prefer one presenter w/ good materials over the panel format
- Janet’s research & presentation
- Review of the topic
- Couple new ideas
- Hear from other planners and what/how they do presentations; address client issues
- Relevant topic

What suggestions do you have on how the presentation could be improved?

- Need another ½ hr for questions (6)
- None (2)
- Regurgitation of others work (?), questions are perfect examples of answers that should be “it depends”
- Get through the introduction a bit quicker next time; was this a panel, or Joe’s open mic time? – more intense moderation to move from topic to topic quicker, prompting more audience questions/participation; very disjointed, somewhat scattered session
- Ask the panelist the same question & allow time for each to answer; it would be interesting to compare answers between panelists
- Panel discussions are difficult to conduct because each panelist doesn’t have a “team context” at an advanced or sophisticated level
- One specialist with facts also figures that back up the numbers
- ...not enough time for four panelists; four panelists on one topic is too many
- Use powerpoint – hard to follow words only
- Wanted more substance, especially from Craig’s portion
- No mention of taxation effect
- They could have provided us with good written materials, including their reference material; providing only contact info is inconvenient for attendees
- Handouts would really help
- Have a moderator & allow panelists to be more conversational in nature
- For panel discussions, it may be more meaningful for the entire panel to answer the same question
- More time for questions at the end
- Not much attention to income tax consequences related to income withdrawals
- Handouts & slides from all presenters
- The panel missed information (ie. Paul Graveguard); went on too long for points made
- More advanced hot issues topics and applications
- Sample from each – actual output in how they present some of their strategies

- Sample plans
- Make sure the podium is not blocking any of the speakers (2), Caroline could not be seen from the left side of the room as one looked at the stage
- Subject has been beaten to death at other FPA trainings, etc
- Best part was @ end, panel open discussion to questions
- It didn't seem like they really prepared all that much
- Format and topic was basic; presenters were fine, but impacted my overall feelings
- Copies of slides are essential – too much to write down & not miss anything
- Should have had slides in book
- We should have received the powerpoint slides
- Enough with the intros; I would love to hear Janet do a full 1 hr on withdrawal rates
- It turns into the soap-box panel
- Would reconfigure the format; too much indirect conversation & too little shared conversation; too few questions (no time) 5 min – each panelist – same ?? group ???
- Make powerpoint presentations readable from back & sides of rooms
- This was a very boring session; I would like to hear more about how income is dealt w/ in retirement by an expert
- Next time have handouts – especially important for subject of this complexity, especially with limited time period
- Handouts, Please; I'd have a similar panel – say 3 folks – and more time for depth
- More interaction; each panelist spoke too long non-stop; too much detail; condense presentation to 5 mins; go for impact to prompt questions or comments from the other panelists
- I think hearing answers to question F would have been helpful
- Knowledge & experience shared
- OH's too small – hard to read
- I prefer to hear a story vs. quoting statistics to bring realism to statistics
- No need for us to know how they got in the business
- Provide written materials in manual
- Panels are great but bring them to a higher level; give strategies, use more product integration on distribution solutions, etc; too long
- Increase the discussion based on real life experience
- Good for a breakout; I already have many of those topics researched & covered
- Slides – pictures are good; what does this presentation look like; show me – don't just tell me

Mike Sir – Protecting Retirement Savings/Disability:

Rating 3.38 out of 4.0	4	3	2	1
<i>Tuesday • 38 evaluations</i>				
Program content	15	21	1	0
Presentation	13	24	1	0
Learning objectives met?	15	21	0	0
Materials accurate?	15	21	1	0
Handouts/av satisfactory?	16	19	3	0
Effective presenter?	21	16	1	0
Appropriate time allocated?	15	23	0	0
Facilities/tech equip appropriate?	19	19	0	0
Presentation was:	Basic: 4 Intermediate: 28 Advanced: 5			
How often?	Next Year: 2 Every Few Years: 31 Once is Enough: 4			
How often would you like an update on this topic?	Next Year: 5 Every Few Years: 29 Once is Enough: 1			
Would you like to receive additional information?	Yes: 6 (names below)			
Names:	Colleen Bollom, Benjamin Hayes, Craig Jergenson, JJ Johnson, Debra Kuper, Anthony Owings			

What did you like most about Mike Sir's presentation?

- Good powerpoint/handout – all details there
- He's gone through a real-life situation, so he's got testimonial
- Good material
- Knowledgeable of subject matter
- Engaging presenter
- Great concept; real issue with our client base
- Great!
- Learned about disability insurance to protect future retirement contributions when disabled
- The concept was good; he just lacked the presentation deliverability
- Okay topic / new / different area
- Presentation style: natural and comfortable; knowledge

What suggestions do you have on how Mr. Sir's presentation could be improved?

- Be more unbiased (vs. Principal)
- What is trust inverted in, when is it written, is it part of "insurance program"? / answered in Q&A section
- Seems so insincere about his wife's death in his analogies to his personal experience; maybe he shouldn't talk about this
- Needed reality; how many clients at 30 contribute \$3,400 a month?

Jack Surgent – Tax Planning Ideas:

Rating 3.89 out of 4.0	4	3	2	1
<i>Tuesday • 282 evaluations</i>				
Program content	255	28	0	0
Presentation	255	24	0	0
Learning objectives met?	246	33	1	0
Materials accurate?	246	30	0	1
Handouts/av satisfactory?	205	60	8	2
Effective presenter?	258	21	1	0
Appropriate time allocated?	227	47	5	2
Facilities/tech equip appropriate?	217	55	9	0
Presentation was:	Basic: 9 Intermediate: 144 Advanced: 118			
How often?	Next Year: 229 Every Few Years: 42 Once is Enough: 1			
How often would you like an update on this topic?	Next Year: 235 Every Few Years: 38 Once is Enough: 0			
Would you like to receive additional information?	Yes: 123 (names below)			
Names:	Sandra Anderson, Pierre Asanchever, Brandon Babcock, Kurt Baldry, Douglas Barinsky, Aimee Bauman, Philip Berg, John Bergstrom, Julie Betchwars, Paul Block, Charles Blossom, Colleen Bollom, Tim Brown, Sharon Calhoun, Robert Callahan, Thomas Campbell, Leo Carton, Kathy Chen, David Daline, Timothy D'Amato, Lynn Daly, Larry DeGraaf, James Donicht, David Dresbach, Kathleen Elbert, Richard Epple, Brian Farley, Andy Feterl, Lori Fick, Steven Finkelstein, Joyce Franchett, Kristin Garrett, Brenda Gempler, Richard Gluck, James Goedtke, Marc Hadley, Jason Hallonquist, Scott Haakenson, Heidi Hansen, Scot Hanson, Paul Hassing, Benjamin Hayes, Curtis Hintzman, John Hinz, James Householder, Daniel Hovland, Timothy Jenneke, Craig Jergenson, Eric Johnson, Jerry Jordahl, Karin Jordahl, Sharon Jordahl, Simajeane Kaye, Mark Keeling, Paul Kinneberg, Charles Klawitter, Gerald Knutson, Michael Kobs, Jerome Kosel, Paula Kozlowski, Ken Kramer, Laura Kuntz, Debra Kuper, Greg Kvilhaug, Gary Lage, James Ledbetter, Brad Leivermann, George Loomis, Seymour Loving, Peter Ludwig, James Lund, Jerry Lund, Julie Matinez, Lucretia Mattson, John McEwen, Christopher Meier, Jon Melander, Marianne Merriman, Jason Merritt, Norman Mitchell, Buzz Moen, Noel Moore, Brent Mueller, Eric Munkeby, Timothy Munkeby, Michael Murphy, Arlene Myers, Royce Nies, John Oberg, Rich O'Connor, Jim O'Halloran, Berthel Olsen, Steve Olsonosky, Anthony Owings, Dana Pollard, Jeff Rathmanner, John Rehl, Mark Rekow, Ronald Revier, Joan Rossi, Lauri Salverda, James Sanders, Alan Scherer, Margit Schubert, Tonya Schulte, Paul Schwartz, Jeff Sessions, Joseph Sessions, Tony Shostak, Barbara Skochil, Fred Sowatzka, Clayton St. George, Paul Stein, Michael Stern, Steve Storkan, Greg Stroh, Thomas Taylor, David Thesing, John Truckenbrod, Todd Utecht, Mark VandenEinde, Katy Vermeer, Mark Veurink, Gene VonMosch, Bruce Wagner, Ronald Wall, Thomas Walsh, Rosemary Ward, Kathryn Waters, Nate Wenner, William Wixon			

What did you like most about Jack Surgent's presentation?

- His great knowledge level and tips for our clients
- Bring back Jack next year!
- Great ideas, very informative; great explanation of retirement options/benefits
- Everything was great!
- Reinforced sunset provision impact
- Substance, style, interest
- Knowledge of the subject
- Excellent presenter (6)
- His energy
- It is so relevant to what we do – we need more of this on an ongoing basis
- Easy to understand – timely information
- This guy's off the charts – knowledgeable, fast moving, clever and makes one think about client opportunities
- Engaging, smart, impassioned
- He makes sense out of current tax issues
- Energy, enthusiasm, knowledge, great ideas, creative approach
- Energy and practicality of information
- Understandable, useable relative information presented in an entertaining way. Best presentation on tax I have ever seen; could listen all day.
- Very well done!
- Clear, straight forward, entertaining approach
- "Real time" use of the overhead – working session format
- Wow! Lots of stuff to think about and plan around!
- Energy on a dry subject
- Applicable ideas and reminders
- Technical nature – competent – applied learning
- IRA planning ideas
- High energy, good examples to bring concepts to life, good off-the-cuff presentation style
- Important topic
- Knowledge, simplicity, he is the best!
- Practical application
- He is very knowledgeable and the topics were terrific, but writing quickly on the overhead is unacceptable. It was impossible to take notes.
- Great tax planning strategies
- Effective speaker; held interest with a very dull topic
- Presentation was easy to understand; excellent

- Useable information; timely
- Current events and new changes to tax code
- Everything (4)
- Great speaker and makes dry info interesting; very useful techniques
- Accurate and down to earth presentation for clients
- Timely information
- Great info that can be implemented immediately; timely and common issues
- Wonderful presenter; had good info – as a CPA, I stayed engaged
- Moves quickly – awesome!
- New ideas, got explanations
- Great examples
- His lively, upbeat, fast-paced manner
- Pertinent info – good speaker
- Energetic
- Always great
- Relevant
- The current information on tax law and how it will impact tax code in 2010 was incredibly informative. He was fabulous!
- Great action items for clients
- Very practical
- Fabulous!!
- Outstanding
- Best presentation, yet
- His passion for his topic; good stuff
- Great info and a lot of it, but still basic enough to understand. I took a lot away from this that I can use in my practice.
- Excellent and technical info and great style – thank you!!
- Very clear explanations
- To the point
- Very intelligent, realize need for CPA for high-end clients
- Interactive, technical, but humorous
- Very intimate and he's knowledgeable – liked his practical examples
- Love the overhead!
- Timely – immediately applicable
- Great analysis of complicated issues
- Dynamic, fast paced, yet distills complex ideas down to be easily understood
- Great info clearly presented
- Updates at the beginning
- Practical planning points
- Knowledgeable on subject matter; energetic
- Great material and presenter (5)
- Current, relevant to everyday planning, fast-paced, GREAT examples to explain concepts
- Everything – his knowledge, energy, examples. This was the best session.
- His use of examples made his points clearer
- Basic common sense planning ideas
- Lots of practical ideas – great style!
- Great coverage of important topics
- Great job!
- Practical planning strategies
- Jack
- Confirmed what I already do in my practice
- Great examples!
- Very broad knowledge
- Schedule H and kiddie tax ideas
- This is a large area of interest to me and my business and I appreciated how he would go over things that we could bring to our clients for their benefit
- Great presentation (4)
- Practical advice for using with clients
- Great job - strategies
- We need to be sure and keep Jack as a regular! Consider for a half-day event during the year!
- Valuable tax information for both high income and middle income clients
- The passion by which he communicated his beliefs and his ability to draw conclusions so we can walk away with process
- He's a dynamic speaker – great pick
- Great ideas! (2)
- His style
- His excitement of the topic
- Practical, interesting planning
- Planning ideas
- Jack is awesome (2)
- Great info and presentation
- Good actionable ideas
- Tax prognostication
- Very good topics that are practical
- Outstanding
- Timely strategies
- Up-to-date useful information

- Enthusiasm, real world ideas, had an opinion and was confident
- Excellent speaker, very informative, thought-provoking, useful, etc.
- Lively presentation, timely information
- Good ideas
- Knowledgeable, energetic, great speaker
- Great “real-life” strategies
- I love that he knows we are consultants who are on the hook to add value with ideas, not sales
- Social security deferral strategy
- Great content
- Talked fast
- Applicable, specific!
- Planning opportunities/ideas
- The detail of his information
- Best presentation at conference
- Good examples
- Planning strategies and ideas to use to help clients

What suggestions do you have on how Mr. Sargent’s presentation could be improved?

- More time (4)
- Too much IRA-related overlap between this session and session #1 on Tuesday
- More bulleted PowerPoint presentation
- Next year for 3 hours; 2 hours in morning, first hour
- Perfect
- With the multiple of overheads that Jack used (that were not part of his prepared outline and accompanying handout), it would be great to obtain them also
- Weren’t quite sure where content was heading
- Bring him back next year!
- If you’re not going to prepare handouts, write legibly!
- Normal real world without having to “push” IRS interpretations. The save for retirement or college education, 401k co-match first, then Roth IRA next was great
- Hard to read overhead slides – move up to the 21st Century; PowerPoint works much better
- Some of the material was basic. PowerPoint would have helped presentation, not hard to just show some numbers more legibly.
- Sometimes the dialogue is too high level and basic
- I would like to see a much larger program
- Use PowerPoint?
- Make it a four-hour presentation
- Handouts could include “hand-calculations” he did on overhead transparencies. Could hand out “his conclusions, recommendations” in written form
- Two hours without a break is too long!
- Using an overhead project is a little dated
- Refer us to materials as he uses overheads, but presentation content just what we need
- I prefer PowerPoint slides to chicken-scratch, but otherwise he is a very effective and talented speaker
- Have a handout of new materials you cover that is not in the manual
- Some overlap with Choate’s comments, but very well explained
- Provide his overhead presentation content in binder
- Don’t say “along those lines” 50 times (2)
- Get rid of the overhead project, or at least have preprinted slides!
- Next year’s topic for consideration: Tax Planning Strategies for Small Business
- Every year would be good. Next year – 3 hours; 2 hours, break, then 1 hour
- Upgrade technology
- He should not try to cover so much material so quickly. Pick fewer topics and cover each more thoroughly.
- Your view on 1031 exchanges is very short-sighted. You are missing the planning benefit of exchanging until death at which time they would get a stepped-up basis with no tax.

Jeff Tegeler – Current Developments in Life Insurance: Opportunities and Pitfalls

Rating 2.71 out of 4.0	4	3	2	1
<i>Tuesday • 273 evaluations</i>				
Program content	43	134	91	7
Presentation	35	112	114	14
Learning objectives met?	49	121	92	8
Materials accurate?	90	144	31	4
Handouts/av satisfactory?	69	128	62	12
Effective presenter?	42	127	89	16
Appropriate time allocated?	49	129	85	10
Facilities/tech equip appropriate?	38	97	99	32
Presentation was:	Basic: 75 Intermediate: 138 Advanced: 40			
How often would you like to hear Jeff Tegeler speak?	Next Year: 26 Every Few Years: 124 Once is Enough: 104			
How often would you like an update on this topic?	Next Year: 35 Every Few Years: 148 Once is Enough: 60			

Would you like to receive additional information?	Yes: 28 (names below)
Names:	Sharon Calhoun, Lee Carton, Kathleen Elbert, Steve Fischer, Scott Haakenson, Mike Harken, Pamela Heimdal, Beverly Huber, Karin Jordahl, Sharon Jordahl, Gerald Knutson, Laura Kuntz, Gary Lage, Lucretia Mattson, Norman Mitchell, Buzz Moen, Eric Moleski, Royce Nies, Lauri Salverda, James Sanders, Carol Schulstad, Kent Schutte, Jeff Sessions, Tony Shostak, Paul Stein, Thomas Taylor, Tad Weiss, Nate Wenner

What did you like most about Jeff Tegeler's presentation?

- Good practical updates
- Many interesting points
- Good info about basics insurance issues
- His magic as part of the pre-game festivities
- Good info – poor room setup & powerpoint/slides didn't work; his presentation would have been more effective in a regular room, not over lunch...not his fault though
- Too technical, too much reading of written data
- Magic tricks (8)
- It was a tough environment for me to pay attention
- Good basics, details in handouts
- Good explanations
- I learned a lot about different types of life insurances, something I'm not too familiar with
- My comments are not about the speaker but instead about how terrible the facilities were, the room was too big, the sound system was awful, the layout put the speaker very far from the audience, the speaker needed to shout, and the effect was echoes, for most of the presentation, noises were heard from other parts of the building – loud thunder – like rolling noises & banging of equipment
- Very informative, explains concepts clearly using examples
- Had good information
- Refresher on life insurance
- Very good review, clear, practical (4)
- His knowledge (2) of the topic
- Monotone – but knowledgeable
- Life settlement & STOLI discussion
- Practical client information
- Knowledgeable (6) on subject matter
- The MN CE Classroom Credit
- Didn't feel we received any relevant information
- Interesting topic but tough environment to be presenting in
- Excellent notes for later study
- He is better magician than speaker
- Thorough handouts
- Life settlement info
- Life settlement & SOLI & Taxation of these policies
- Love the rope tricks
- Good overview of life insurance products & industry – lot's of facts, lots of material
- Don't know what learning objectives were; his opinion on UL-secondary guarantees? Better than UL? (of the 80's turned out to be?!)
- Raised question w/o an answer (at least an opinion); alternative to "whole life" as a permanent life policy (!) First applause would have been a good place to end.
- Excellent presentation – would like to see this other than at lunch – hard to listen in lunch area
- It would be nice to receive annual update regarding recent legal rulings surrounding life settlements
- I was able to have historical overview of the insurance industry
- Good detail
- His materials were informative
- Very good materials, very useful update
- More explanations on present developments, less on basics
- Always does a nice job
- Nothing, horrible!
- The information on the various types of insurance; his perspectives on the industry changes
- Great rope trick – handout, which will let me read in more detail on the topic
- Good basic review
- The rope trick was good...hard subject to keep my interest
- Made a dull subject interesting; insurance (in my opinion) not well known or understood by FPA universe
- A lot of solid information
- Bring large crowd up to speed on life insurance
- Jeff is a very knowledgeable individual; would have preferred estate planning focus & new insurance options including PRIVATE PLACEMENTS
- Lots of interesting information and ideas to help clients
- Good historical
- For those with no insurance background it may have been beneficial...scary to think Financial Planning professionals would be that elementary in knowledge of life insurance
- Very crisp presenter – great resource & materials
- Expert knowledge
- Jeff is always prepared & knows his topic
- It is about things which are often overlooked
- Covers some fundamental insurance issues/material & also hit on some more advanced issues – very knowledgeable
- OK
- Content could be very informative at the right time
- Good technical knowledge

- Good overview of insurance policy history; Best – info on issues of current trends; old policies today* - Magic was a fun twist
- Relevant to me as I've sold insurance for 22 yrs. And have older policies issued at high interest rates
- So-so at best
- Not so technical

What suggestions do you have on how Mr. Tegeler's presentation could be improved?

- Some kind of visual would have been nice, Powerpoint with bullet points or graphics to "mix it up"
- Have a few "large view" overheads
- Too basic...this session might be helpful for agents getting into the business, most of us have been dealing with these life insurance issues for years
- Too basic, needs more meat on topic
- The sound system/acoustics are not real great in the area in which were served lunch
- Needed Powerpoint slides, very dry material/presentation
- Bad acoustics, had to leave, could'nt hear
- Cheaper purpose, cleaner points
- Get rid of the overhead
- Overhead projection, liven up content
- Good magic
- Use visual aids (3)
- It would have been helpful for more info related to estate planning
- Way too complex; needs to effectively communicate the topic; where is this applicable; case study would be useful
- It was a tough room to present in...chairs were noisy to move, a bit of an echo, etc., why was there an overhead? Blocked the speaker
- This presentation needs to be in a classroom with some decent visual aids
- Was hoping for more ideas about opportunities & pitfalls rather than general life insurance type review. Why was the overhead projector there? It gave kind of an "oh oh – is this talk going to be as dated as the projector" feeling at our table – and wasn't even use!
- Use A/V even though it's lunch – easier to follow what he is saying
- The acoustics in the room were very poor
- It seemed like too much material for the time frame & came across scattered
- "beat 'em up 'bout the sound system, Jeff – it (&/or the room) sucked!
- Topic is too "dry" for lunch presentation; I would have better focus if this was presented in classroom
- Examples, talk to the audience, don't go over the history of LI, get to the topics of today
- Spice it up
- Good job, no suggestions
- Use a powerpoint (2) presentation on how to review existing life insurance policies with case examples, I prefer a different topic next time, such as Estate Planning using Life Insurance
- Powerpoint, more practical application on fewer areas
- The large ballroom is a rough place for a presentation
- Too long for material, was historical, difficult to do a good job in the dining hall – believe info is very valuable – should have time allocated to main room
- Topic is not of interest to me, less on where we've been, more on what's now & future trends
- Should be a break-out instead of general presentation
- Work on speaking skills
- His opening was entertaining, but the material & how he covered it was rather dry
- Use powerpoint to follow along; hard to be a lunch speaker – should have been main stage
- None – good; acoustics in lunchroom not the best
- Lunch room is tough for effective presentations
- ~~Lose the rope trick!~~ Turns out that the rope trick was the highlight!
- Get the time right
- Visuals (slides) would really help to illustrate his points
- Jeff would be better doing Estate
- Timely – informative
- Cover more on fewer items
- Room temp too cold; note: this room does not have adequate acoustics
- I would recommend to put some personal stories &/or jokes to break up the talk
- Presentation would be better with powerpoint/slides; this topic is a little tough right after lunch
- Not speak during lunch without props to keep audience awake...don't start and stop and start again
- Jeff is a great resource, authority, & speaker for complex planning issues; his talents, experience & expertise were wasted on a basic subject
- More personal examples of how the policies are used or misused
- Try not to be the luncheon speaker; tough topic on full tummies!
- Need to have overhead for some statistics
- He needs to update to Powerpoint; also would not have this topic for the luncheon hour, instead something more uplifting to take us into the afternoon
- Vary your tonality a bit, otherwise you did a great job
- Not to read the notes to us
- Graphs on the projector/visuals, during lunch would be helpful
- The acoustics in the room were simply awful; has all the appeal of a bus depot, it was noisy and difficult to hear the presenter
- Not over lunch
- Dry topic, but good job presenting it
- Have something to show on the screen
- They should schedule this material during a breakout session, not right after lunch or in a general session
- Powerpoint slides/outline to follow along; charts, graphs, pictures make it easier to follow
- More traditional info – too much on highly unusual uses – like selling insurability's
- Overheads would help; real life examples on how he's fixed the problems discussed

Financial Essentials – Mid-Career Changers:

Rating 3.81 out of 4.0	4	3	2	1
<i>Tuesday Breakout • 14 evaluations</i>				
Program content	9	5	0	0
Presentation	11	3	0	0
Learning objectives met?	10	3	1	0
Materials accurate?	9	1	2	0
Handouts/av satisfactory?	5	5	1	0
Tom Alf – Effective panelist? 3.79	11	3	0	0
Todd Gruenig – Effective panelist? 3.93	13	1	0	0
Mike Miller – Effective panelist? 3.93	13	1	0	0
Kris Andersen – Effective moderator? 3.71	10	4	0	0
Appropriate time allocated?	10	3	1	0
Presentation was:	Basic: 9 Intermediate: 4 Advanced: 0			
How often?	Next Year: 8 Every Few Years: 2 Once is Enough: 3			
Would you like to receive information about becoming a member?	Yes (3): Rob Daline, Jason Merritt, John Samstad			
Interested in Career Day in February 2008?	Yes (4): Rob Daline, Melanie Hardie, Jason Merritt, John Samstad			

What did you like most about the panel presentation?

- Questions and Answers
- Opportunity to ask questions; open dialogue
- Fresh look at real reactions to getting in the industry; the honesty
- Excellent humor and useful life experiences
- Great to hear personal stories
- Perspective of the change that occurred in their personal lives
- Different perspectives
- Glad to hear their stories; they were honest
- Informal and knowledgeable; personal stories are insightful

What suggestions do you have on how the panel could be improved?

- Give aways / free stuff
- None; great job and your insights helped a lot.
- More interactive Q & A
- Since majority of audience was in FP, maybe should focus more on what worked or did not work versus thinking about going into business
- This was a great panel; would have been great to have more career changers here

Financial Essentials – Students and New Planners:

Rating 3.53 out of 4.0	4	3	2	1
<i>Wednesday Breakout • 6 evaluations</i>				
Program content	4	2	0	0
Presentation	4	2	0	0
Learning objectives met?	5	1	0	0
Materials accurate?	3	0	0	0
Handouts/av satisfactory?	3	0	0	0
Lori Fick – Effective panelist? 3.67	4	2	0	0
Joe Pitzl – Effective panelist? 3.83	5	1	0	0
Ben Wacek – Effective panelist? 3.67	4	2	0	0
Austin Colby – Effective moderator? 4.00	6	0	0	0
Appropriate time allocated?	3	2	1	0
Presentation was:	Basic: 2 Intermediate: 3 Advanced: 2			
How often?	Next Year: 5 Every Few Years: 1 Once is Enough: 0			
Would you like to receive information about becoming a member?	Yes (4): Benjamin Hayes, John Samstad, No Name Overall: Brian Bieter, Focus, bbieter@focusfinancial.com			
Interested in Career Day in February 2008?	Yes (2): John Samstad, No Name			

What did you like most about the panel presentation?

- Interesting to see the young person's perspective – I am an older career changer.
- Honest, candid, real answers to very basic, but necessary questions. Very informative!
- Thanks for sharing your experiences. A very wise group indeed.

OVERALL SURVEY

Exhibitor Interaction:

Rating: 3.19 vs. 3.33 in 2006	4	3	2	1
151 evals	49	82	20	0

Meals, Beverage Breaks:

Rating: 3.31 vs. 3.15 in 2006	4	3	2	1
157 evals	70	65	22	0

Reception:

Rating 3.31 vs. 3.38 in 2006	4	3	2	1
90 evals	37	44	9	0

Meeting Location:

Rating: 3.50 vs. 3.68 in 2006	4	3	2	1
155 evals	88	58	7	2

Value for Price:

Rating: 3.55 vs. 3.50 in 2006	4	3	2	1
155 evals	94	54	6	1

What two things did you like the most about this year's Symposium?

- Economist Panel (23)
- Jack Surgent (37)
- Natalie Choate (30)
- Natalie Choate – she was excellent, highlight of the event for me!
- Karen Palm/Jack Surgent – good presentations; wish they could have been longer
- Mary Anne Ehlert (4)
- Joe Jordan (9)
- Jennifer James (22)
- Retirement Income Planning panel discussion (3)
- Ethics - Keith Loveland/Matt Boos (3)
- George Johnson
- Networking; meeting and talking to other advisors (13)
- Great networking at reception
- Seeing all the people I've worked with over the years
- Interaction with partners (3)
- Exhibitors were fun to talk to; I won a CD and an ipod!
- Win prizes
- Friendliness of exhibitors was great
- Speakers Choate, Jordan, Surgent, James, Webman, Kelly
- Hearing national-type speakers (2)
- Very interested in almost all of the speakers' topics
- Most speakers were very good (2)
- Speakers were better than last year
- Presenters were a higher caliber than past years as a whole. Other years, there were excellent presenters, but there were weak presenters in the mix. This year was stronger across the board, especially the breakouts.
- FPA participants are progressing professionally as a force; very validating.
- Excellent/Great speakers/Caliber of speakers (24)
- Thorough handouts and materials
- Interesting FPA members
- The speakers, including breakout sessions, were great (2)
- Gathered lots of practical, useful information
- Variety and depth of topics and speakers (12)
- Great presenters; diverse topics (5)
- Good speakers; new ideas
- Content of presentations; very educationally focused symposium (2)
- Received information I can use; update knowledge (2)
- Well organized (3) and accommodations were great
- Overall quality of presentations (3)
- Venue flowed smoothly and efficiently
- The topics were on point to today's market
- Program mix; topics right on (4)

- Knowledge of speakers
- Meals good (2)
- CE credits (3); getting all my credits efficiently (1)
- Location/facility/layout of rooms/exhibitors (4)
- Location and price
- Combo of strategy speakers and passionate/human side speakers
- Location and attendance numbers
- Date and time of year
- Like meeting on Tuesday/Wednesday or Wednesday/Thursday
- Bonnie
- Credits available to WI residents
- The breakout options during day one were great; would have enjoyed breakouts on both days
- Seeing familiar faces, meeting new colleagues
- Listening to new/different speakers
- Keep the price low! This is a great “value” conference.
- October date versus November date (4)
- Ton of info
- Bonnie Stanley was wonderful as usual and everyone who put this symposium on, too! Thank you!
- Good timing for exhibitors
- We should always have one session that is from a non-financial expert (James)
- Professionalism
- Mostly excellent speakers, interesting, provocative, informative. I want to learn – that’s why I come, that and the credits.
- Really have enjoyed the breakfasts the past two days. Good is good and served well – also hot items; especially good for commuting in.
- Thanks for having plain hot water to drink

What two things did you like the least about this year’s Symposium?

- Luncheon Speakers (11)
- Speakers being made to present in dining hall
- We should lunch and network; relax and converse with others (4)
- Both lunch presenters should have been better; should have been less technical and more fun – for a lunch
- Lunch presentation is better done as a classroom presentation vs. lunch. Lunch needs to be livelier.
- James Barnash (1)
- Jeff Tegeler (10)
- George Johnson (1)
- George Johnson – audience too large for him to be effective
- Joe Jordan – heard it before; don’t appreciate emotional hijacking
- Need entertaining speakers for luncheon time slots
- Jennifer James (4)
- Jennifer James – I didn’t walk away with any new insights/knowledge from her presentation
- Retirement Income Panel (7)
- Alternative Investment presentation (1); total sales pitch (1)
- Income panel was off the mark; too basic
- Karen Palm (1)
- Retirement Income Panel – I like the idea, but may change it to 3 panelists and have them answer the same question. Janet’s was too long.
- Code of Ethics (1)
- Not enough time for large panels
- Not enough time for exhibitor interaction
- The life insurance pitch
- Not enough time for Mary Ehlert; poor materials by Mary Ehlert
- Too much time on introductions for retirement panel
- Too much overlap on tax issues between Choate and Surgent
- Tuesday “new planner” panel – not enough perspective; panelists were very similar
- Too structured; not enough free time
- Not enough time with vendors
- Coffee cups need to be bigger
- Two hour sessions without a break (3)
- Lack of breakout choices
- Too much insurance topics on day 1 (2)
- Lunches (5)
- Lunch speakers should be something light and fun
- Shorter sessions – longer breaks for phone calls, etc.
- Cold food
- Lunch area (2)
- Luncheon speaker – have qualitative presenters that inspire
- Lighter lunch; lasagna was too heavy
- Odd/cold environment in lunchroom; space is horrible (3)

- Lunch in “big black box”
- The room for lunch, acoustics, chairs scraping, difficult to hear presenters (18)
- No soda in morning or at lunch
- The lunch presentation on Wednesday was dry and difficult to understand because of poor acoustics in the room.
- Noon presentations; would rather have a lunch for networking and then presentations in the main room or as breakout choice (2)
- Convention center acoustics are poor in lunch area for speakers, but I did appreciate having presentation during that time to fit in more CFP credits (2)
- The location is dismal; atmosphere here in the sub-basement has all the warmth and ambience of a bomb shelter
- Presentations at lunch – shorten the lunch to 30 minutes and then have presentations back in the main room; better audio and video (2)
- I don't like the convention center; pencils are cheap and don't work well
- Signage regarding outside struts is covered by structure and exhibitors; this needs to change.
- Basement rooms and flat meeting rooms; they have stadium rooms that are easier for audience to see
- Meeting in the lower level; are we too large a group to meet on the main floor
- A little too much right brain talk for my liking; I'd rather focus on the meat of the financial planning process: estate planning, insurance, retirement planning, etc.
- Need Estate Planning topic
- Not enough exhibit time
- More interaction with attendees
- Will not attend late afternoon/early evening events
- The mixture of speakers
- Temperature in facility was too cold
- Reading credentials – unnecessary details
- It's all about you being here for our own good
- Every presenter needs to give their slides in the notebook
- I prefer panels to be interactive; the Retirement Income Panel was not and had too many people on it for that amount of time
- Prefer middle of November for conference
- A location that is easier to get to – not downtown
- Move back to first week of November
- Not being able to take advantage of more of the breakout sessions
- Having to choose breakout session; wanted to attend 2 others, I could not
- Could use more breakout sessions in smaller groups
- Date too close to FPA Seattle
- Date too close to Schwab Institutional
- The ethics breakout was fascinating, but I'm not sure we talked about ethics
- The lunch speakers need to be motivational/exciting. The speakers were hard to hear in the lunchroom and I think it was due to the size of the room and lack of ceiling/carpet so the microphone was echoing.
- Sound quality during lunch presentations (2)
- Four breakout sessions are at same time with Code of Ethics. Consider having Code of Ethics and Financial Essentials for students and new planners so that experienced planners can choose Ethics without missing many breakout sessions on day one.
- Technical/communication issues – always a challenge
- No cell phone service in lower levels (2)
- Cell coverage; having to go upstairs detracted from time with exhibitors
- Can we shorten the length of the Symposium? Please! (1)
- Writing my insurance license, name and email on every survey
- The material binder was very heavy; please ask exhibitors to provide a one page master and then make 2-sided copies for them

What improvements would you suggest for next year's Symposium?

- Have the new planners panel toward the beginning of the Symposium rather than the last event. I think we would get a better turnout and it would give students an opportunity to meet each other and members.
- More time or less panelists for the Retirement Income Panel (2)
- Better acoustics for luncheon presenters
- Five minute increase for break
- Shorter breaks, done earlier
- More sessions of advanced topics (2)
- More breakout sessions
- More “how to” sessions
- Someone like Jennifer James during lunch
- Good av at lunch presentations
- Limit presentations to 1 ½ hours; 2 hours is too long for me
- Start later so we are not forced to deal with rush hour traffic
- Don't just read the speakers' bios. I can read them in the book. Give me highlights only.
- Make sure to have another panel
- I'd like to see more information on creating streams of income during retirement
- I didn't like the Bingo Card idea. I know why it was done, but it seemed people would interrupt a conversation just to get their bingo card signed. Also, I think the “free drawings” should include everyone and not just those who put in their business card. Have the free drawings include all attendees.
- I would suggest having lunch for 30 minutes and then back into the main room for the presentation portion. The hall where lunch is held is simply not conducive for a speaker to give an effective presentation.

- Even more time for top-notch keynote speakers
- Different food, a psychologist about money, new case for ethics course
- If you have someone promoting insurance, please be up front about it rather than cloak it in a life planning title “Life of Significance”
- Have lunch speakers be someone who doesn’t need PowerPoint and is very energetic
- Lighter lunch
- Add soda to lunch
- Pop in the AM; need caffeine
- Juices/non-pop or coffee items at breaks
- More and better breakfast and break stuff; ran out both days
- Joe Jordan type lunch speaker
- Better luncheon on Wednesday
- Provide healthier food, beverages and snacks
- Better food during breaks
- Make lunch presentations lighter – even non-credit; credits aren’t as critical – need a break from other presentations
- Lunch topics could be less technical heavy topics
- Don’t have speakers during lunch
- Hate lower level
- Code of Ethics – tighten time management of discussion time allotment; clients/graphs/pictures vs. words
- Keep up the high quality of outside speakers
- Hard to read overhead slides at times
- It’s helpful to have an agenda on the back of the binder. Chimes are a great, gentle yet effective tool for reminder of sessions starting. Would you be able to get Jean-Marie Evillard to speak?
- Mike Roby – excellent speaker to check out; formerly with ManuLife
- Include an executive summary (one page) for each presentation
- Provide more practice management tools
- Better lighting and sound for luncheon speakers
- Have CE request and evaluations on separate sheets
- I think that hearing personal stories are very powerful and can be a good balance with some of the technical stuff
- With structured CPE requirements, it would be nice to have more time in between to visit exhibitors and fellow members
- More hotels to choose from with FPA discounts
- Change date to November; I can still golf and fish in October, still hunting season
- Convention Center okay, but annoying. Better facility?
- I liked the varied topics that you have done. Overall, I wouldn’t change the format; keep focusing on getting great speakers.
- Speaker on Behavioral Finance
- More non-financials like Jennifer James
- Session on new tax laws
- Session on college aid
- 2 economists every time
- Every year, do Jack Surgent 2 hours, Economists 2 hours, Natalie Choate 2 hours, Estate Planning (including MN) 2 hours
- Should we try a Radisson/Mariott?
- Move location to suburban hotel as we did in the dim past
- I’d focus on 1-2 more good speakers/topics and cut the lunch presentations
- Please put where each meeting is on the surveys or perhaps any place that is not the main room

General Comments:

- I wish the signage in the Convention Center was better. Start signs are hidden by exhibitors!
- Keep up the good work!
- We should be notified in the large conference room to bring the handout & evaluation sheet (2)
- I thought this was a great Symposium; I’ve heard a lot of positive feedback.
- First time at FPA Symposium – will come back for sure!
- Excellent Program/Great Job!! (3)
- Great seminar – it was worth the 650 mile drive!! Thank you!
- Nice Symposium!
- Overall, pretty good.
- Overall, great conference!
- Great/Good job (2)
- Great 2 days – thanks for all your work!
- I enjoyed the program
- Much more good things than unfavorable. Generally excellent use of my time. Excellent quality of presenters.
- I look forward to coming every year; keep up the good work – very much appreciative of the chance to come and participate
- Excellent, thoroughly enjoyed both days
- Excellent use of my time
- Mixing in non-technical topics that are relevant are great!
- Always enjoy the symposium
- Thought your speakers were generally excellent
- Put Becky in charge!
- Why was the date changed? Is anyone aware that this will adversely affect credits for many. I probably will not attend next year because I won’t be able to use the credits. I used last year (2006) for my 07/08 period and this year for 07/07. If next year’s FPA is in October, then I can’t use the credits.

- I thought it was a terrific program and I hated leaving the Retirement Income forum early
- Keep up the good work
- Bingo was not an incentive for me to visit the vendors. If I had known the vendors were going to draw business cards for fun prizes, I may have visited more of them and dropped my card in.
- Thank you Bonnie Stanley, Jolene and the Symposium Committee for an outstanding program!
- Wish list – panel idea: Safe Withdrawal Rate Panel with Wm Bengen, Jon Guyton and John Spitzer
- Congrats to committee! Fabulous conference.
- This is the one conference I won't miss! I have been here 8 years and they just keep getting better!
- Very well done!
- Good job Planning Committee
- Dr. Kelly rocks!
- Great line up of speakers – very professionally done! Thanks, Bonnie and crew!
- Really enjoyed it!
- Much of material applies to high net worth individuals which does not apply to me in most cases
- Great benefit!
- Great job of keeping room clean and refresh H2O
- Thanks, Bonnie and staff. Great food! Temperature A-OK! Really flowed nicely.
- Continue with speakers like Jennifer James in addition to specific financial planning topics. She should have had 2 hours and the economist panel, too.
- Very good! This symposium continues to be one of the best. I always learn at this event and quite often am blown away by at least 1 or 2 of the speakers!
- I always look forward to the FPA symposium.
- FPA should rotate chapter meetings around the Twin Cities; time to give other places a chance outside Golden Valley

I am interested in serving on the Symposium Committee:

- Neil Friedman, 952-238-1031 (partner)
- Rich O'Connor, 715-531-1973, rmoconnor1@comcast.net
- John Samstad, 612-644-8701, jsamstad@iastate.edu
- Robert Callahan, 651-714-0323, robertcallahan@comcast.net

I am unable to serve, but have a few hours to volunteer:

- Dean Maschka, 651-636-3353, dmaschka@firstresourcegroup.com
- Bridget Handke, 952-767-1215, bridget@klbfinancial.com

I would like to work on a one-time project:

- Ford Droegemueller, 952-885-5004, ford.droegemueller@lpl.com
- Leo Carton, 651-491-4781, leocarton@comcast.net
- Nan Owen, 612-823-2954, nfowen@comcast.net

Refer a new annual partner and receive a Free Pass:

- Mike Matkovich, SEI Investments, 610-676-2326 (referred by Cathy Juilfs)
- Tim Ripp, Associates of Clifton Park, 800-836-3914 (referred by Bob Callahan)
- Please let me know when you are soliciting; I may have some ideas (Nan Owen, 612-823-2954)
- Jeffrey Rose, Franklin Templeton Investments, Brett, 800-462-1264 x37253 (referred by Bruce Wagner)
- Matt Lesnikowski, Pioneer Investments, 612-385-0411 (referred by Bruce Wagner)

PROGRAMS - Planning for 2008:

	4	3	2	1
Real Estate Market	16 11%	59 42%	58 41%	9 6%
Mortgage Lending	5 4%	13 9%	69 49%	53 38%
Reverse Mortgages	8 6%	43 30%	60 42%	31 22%
Case Study	28 21%	46 35%	39 29%	20 15%
Foreign Markets	49 35%	65 46%	21 15%	5 4%
Asset Allocation	44 31%	60 43%	32 23%	4 3%
Economic Forecast	85 59%	46 32%	11 8%	3 2%
Required Minimum Distribution	37 26%	55 39%	40 29%	8 6%
IRA/Roths	50 35%	65 45%	26 18%	3 2%
Alternative Investments	38 26%	61 42%	33 23%	12 8%
Retirement Income Portfolios	73 49%	58 39%	16 11%	2 1%
Divorce Planning	33 23%	58 41%	44 31%	8 6%
Estate Planning Strategies	78 53%	52 36%	15 10%	1 1%
LTC And When/How To Use It	48 32%	65 44%	32 22%	3 2%
Health Care Issues	39 27%	60 42%	38 26%	7 5%
Tax Issues	89 64%	43 31%	8 6%	0 0%
Charitable Giving	30 22%	68 51%	34 25%	2 1%
Children & Money	29 21%	59 42%	47 34%	4 3%
College Planning	24 18%	62 46%	40 29%	10 7%
Planning for Middle Income	39 28%	61 45%	29 21%	8 6%
Planning for Unmarried Couples	22 16%	41 30%	53 39%	19 14%
Life Planning	44 33%	61 45%	25 19%	5 4%
Client/Planner Relationships	37 27%	61 45%	31 23%	7 5%
Compliance	12 10%	54 45%	39 32%	16 13%

Technology Issues	26 21%	43 34%	47 38%	9 7%
Behavioral Finance	50 34%	53 37%	31 21%	11 8%
Grief Counseling	7 6%	39 33%	63 53%	9 8%
Structuring Personal Debt	13 10%	39 30%	62 48%	14 11%
Identity Theft	16 14%	41 36%	50 43%	8 7%
Insurance	15 11%	55 41%	55 41%	9 7%
Marketing	30 23%	41 31%	44 34%	16 12%

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.

Suggested Speakers and Topics

Real Estate Market:

- REIT's
- Trends & Outlooks (2)
- Geographic variance for retirement homes & twin cities
- Jeff Scislow – Realtor
- RE in AA – Shawn Brady Div Capital Trust
- 1031 exchange
- Investing in Rental Real Estate, How can advisors help clients evaluate

Reverse Mortgages:

- How to effectively use
- John Curtis @ Countrywide 952-240-3920 – When is it a good fit, or not(evaluating)

Case Study:

- Couple with parents needing care & financial help managing this
- Determining with drawl rates & demonstrating on real cases
- Retirement cash flow planning

Asset Allocation:

- Panel re: increasing global & international allocations
- SBA
- Including Alternatives and how to devise a portfolio w/alternative
- How to select mutual funds into a model

Economic Forecast:

- Dr. Q. Krosby
- I love Gary Stern & David Kelly, but there may be others
- ESP in light of 2008 elections
- Mack Dotzer TX A&M

IRA/Roths:

- Natalie Choate
- Ed Slott (2)
- Roth 401K, update on IRS
- Details of doing conversions

Alternative Investments:

- Devising w/portfolio
- No more hedged strategies. Try Asset backed loans, Premium life insurance, distressed debt, oil & Gas
- Tic Investments, Chad Hunt triple net

Retirement Income Portfolios:

- Which assets to tap when, Tax deferred, 401K, IFA, Tax Free Roth, Taxable SS
- Current Trends
- How to set up a new retiree to fund living expenses in retirement – Jon Guyton

Divorce Planning:

- CDFPs
- Second marriage planning
- Any Jensen Wolff
- Current planning for protect of clients in the case of divorce – Tom Alf

Estate Planning Strategies:

- Current Trends
- Could Mary Anne Elhert come back for 2-3 hours? She was so rushed
- Stuart Bear
- Chestnut & Carbonne Law Firm
- Earl Cohen
- Bring back Ehlert

LTC and When/How to Use It:

- How to consult
- Deb Newman (4)
- New partnership program
- Recent changes in partnering
- Disability planning for someone – pre-retirement, where/what are resources?
- Trish Lawson 636-6333

Health Care Issues:

- Disability Insurance
- How about a physician or researcher on trends?
- Update on universal leverage
- Costs & Issues in Retirement
- How to bring into financial planning discussion
- HSAs – Example of when it makes sense – Do you take medical expenses out of account or let grow

Tax Issues:

- Current trends
- Keep it coming!
- Planning opportunities – Jack Surgent
- Same guy
- Have covered; Kitces & Surgent for now
- Natalie, Jack Surgent or Don Slott
- Current Environment & Potential Changes, Executive Compensation/ How to guide clients w/ unknown estate tax environment?

Charitable Giving:

- Bill Sterberg
- CRTs & Retirement Plans

Children and Money:

- Capture wealth transfer
- Dugan
- Share-Save-Spend

Planning for Unmarried Couples:

- Including post-mortem, planning for surviving spouse

Life Planning:

- Carol Anderson, Money Quotient – great research/trends
- Dealing with aging clients – guidelines for when they should not be making financial decisions. How to protect the planner?
- Ken Dykeswald – Age Wave Forcaster

Client/Planner Relationships:

- Create Raving Fans
- Behavioral Advice – Doug Lennick

Technology Issues:

- Income software

Behavioral Finance:

- Great choice this year!
- Behavioral advice – Doug Lennick

Grief Counseling:

- Dr. Janice Nadreau
- What to say and when

Identity Theft:

- Chris Abbas – Minnesota Financial Crimes Task Force

Insurance:

- Review of old existing policies – what to do with them
- DI
- Middle market insurance sales ideas – not estate planning
- Insurance Planning for business owners

Marketing:

- Ideas
- Peter Montoya
- Your business, yourself, your services
- Wendy Nemitz – Ingenuity Marketing

Other Topics:

- I think a session on the value & how you sell a practice would be interesting (Dean 651-636-3353)
- How to protect our business/reputation etc. during our careers. What do we need for insurance!! How can we plan to prevent a lawsuit?

What is your time preference? PLEASE RANK, with 4 being your top choice.

110 responses	Top Choice	3	2	Last Choice
Morning	73 66%	11 10%	9	17
Lunch	22 20%	48 44%	22	7
Late Afternoon	8 7%	28 25%	44	7
Evening	18 16%	6 5%	9	59