

# SYMPOSIUM 2009: Planning for Success

## Attendee Evaluation – Comments from up to 388 attendees

### OVERALL SURVEY

#### Exhibitor Interaction:

|   |          |          |          |          |
|---|----------|----------|----------|----------|
| <b>Rating: 3.39</b> vs 3.30 in 2008 vs. 3.19 in 2007 & 3.33 in 2006 | <b>4</b> | <b>3</b> | <b>2</b> | <b>1</b> |
| 159 evals   | 73       | 75       | 11       | 0        |

#### Meals, Beverage Breaks:

|  |          |          |          |          |
|--|----------|----------|----------|----------|
| <b>Rating: 3.02</b> vs. 3.22 in 2008 vs. 3.31 in 2007 & 3.15 in 2006 | <b>4</b> | <b>3</b> | <b>2</b> | <b>1</b> |
| 164 evals  | 54       | 69       | 32       | 9        |

#### Reception:

|   |          |          |          |          |
|---|----------|----------|----------|----------|
| <b>Rating 3.31</b> vs. 3.29 in 2008 vs. 3.31 in 2007 & 3.38 in 2006 | <b>4</b> | <b>3</b> | <b>2</b> | <b>1</b> |
| 63 evals  | 33       | 32       | 6        | 2        |

#### Meeting Location:

|  |          |          |          |          |
|--|----------|----------|----------|----------|
| <b>Rating: 3.55</b> vs. 3.61 in 2008 vs. 3.50 in 2007 & 3.68 in 2006 | <b>4</b> | <b>3</b> | <b>2</b> | <b>1</b> |
| 163 evals  | 101      | 52       | 9        | 1        |

#### Value for Price:

|  |          |          |          |          |
|--|----------|----------|----------|----------|
| <b>Rating: 3.50</b> vs. 3.52 in 2008 vs. 3.55 in 2007 & 3.50 in 2006 | <b>4</b> | <b>3</b> | <b>2</b> | <b>1</b> |
| 164 evals  | 93       | 60       | 11       | 0        |

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

- All day Thursday in one room
- All sessions were well done
- Ann Burns (4)
- Appreciated concentration on Financial Life Planning
- Behavioral Programs
- Betty Garvey
- Bob Veres (8)
- Breakout sessions were great
- Breaks during long presentations to visit with exhibitors
- Casual lunch arrangement
- CE credits (3)
- Comfortable layout
- Convenience
- David Kelly!!
- Diverse topics
- Earlier out on day 2 (avoid traffic)
- Economist presentation – Dr. Kelly
- Economist Panel (28)
- Estate Planning sessions
- Everything except Louis Stanasolovich
- Excellent education, current with the times
- Excellent presenters/speakers (4)
- Excellent speakers, wonderful topics (2)
- Exhibitor interaction
- Facilities/programs went smoothly – thank you!
- Ability to get CE credits for 3 designations: CPA, CFP, Insurance License

- Financial Life Planning
- Financial Planning Essentials
- First time; speaker selection was good for the most part
- Focus on financial life planning: Veres, Diliberto and Anthony
- Food (2)
- Good mix of technical/practical items and “soft”/people aspects of financial planning (Diliberto, Anthony, etc.)
- Good networking
- Good schedule and food
- Good speakers (2)
- Good speakers with relevant topics
- Good spectrum of info/presentations
- Good use of time
- Good variety of topics
- Great ideas and concepts to use in my practice
- Great local vendors
- Great mix of exhibitors and presenters – very engaged
- Great national speakers
- Great presenters/speakers (8)
- Great speakers: Bob Veres, Mitch Anthony, Jack Surgent, Economic Overview
- Handouts downloaded
- I like how the schedule keeps everything moving
- I loved the presenters
- Jack Surgent (18)
- Jack Surgent – great material and explanations
- Jack Surgent – invite him every year
- Jack Surgent – tax issues and what he expects may change are critical planning issues
- Jack Surgent was insightful as usual
- Keith Loveland (3)
- Life planning focus
- Light lunch with no speaker
- Like the combination of general sessions (main room) mixed with breakout sessions
- Liked all presentations in same room on day 2
- Location (3)
- Longer time per speaker was great
- Main room meetings
- Many great speakers and topics
- Mitch Anthony (56)
- Mitch Anthony – subject and speaker were outstanding, truly inspiring (2)
- More interest in connecting with vendors (Best Prep, Comer, Pathfinder, Laserfiche)
- Most of the speakers
- Networking and vendors
- Networking opportunities (5)
- Nice breaks
- Number and type of sponsors
- Overall great speakers
- Pitchers of water on tables
- Presenters (all high quality) (2)
- Program
- Quality of the speakers
- Round tables are good
- Roy Diliberto (14)
- Roy Diliberto and Mitch Anthony were great presenters, but general sessions were good
- Saw some people have not seen in a year
- Second day presentations were great (2)
- Several speakers were extremely good; ie Betty Garvey was a really effective communicator and educator for “basic” level estate planning; Jack Surgent turned a dry “box” conversation into an interesting presentation.
- Speaker line-up with 1 exception
- Speakers (3)
- Speakers were excellent
- Strategies to be applied to business
- Thursday’s speakers – each of them – fantastic!!

- Took away a few good ideas
- Topics (2)
- Variations of subjects offered by the speakers
- Variety of speakers and topics
- Very relevant topics
- Were much better at keeping to schedule compared to previous years
- Wide variety of exhibitors
- Excellent partners and interaction with FPA
- Positive comments and buzz
- Large attendance = huge!
- Good reception (Wed pm)
- Overall sound good! No technology problems.
- Very helpful staff (Kelber Catering)

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

- Breakout sessions on advanced estate planning and advanced asset allocation just weren't what I was looking for
- Ann Burns
- Basement location of Minneapolis Convention Center; low signal for phone and internet.
- Betty Garvey – no focused point
- Bob Veres (2)
- Bob Veres – not much new material (2)
- Bob Veres was the least of the three – same type/message of the sessions. Veres, Diliberto, Anthony were all the same; only needed Anthony!
- Breakout sessions
- Breakout sessions good, but if ethics required, they were missed
- Breakout sessions short
- Breakouts were less than expected in quality and cramped in space
- Breaks too long
- Buffet luncheon lines moved too slow
- Cold in conference room
- Convention parking ramp automatic exit machines – slow
- Conversations with vendors interrupted by bingo stamp seekers
- Cost
- Didn't have enough time to network and check out exhibits
- Few breaks
- Fewer sponsors than last year?
- Food was very below average.
- I like the big room we used to be in. Meals, snacks, beverages were not nearly as good as in the past; do not like buffet. If money is the issue, would rather have it spent on speakers than food.
- I thought the breakouts could have had more useful information. Maybe I attended the wrong ones.
- I was a little bored on the first day – good info, but not much for dynamics
- Investment/Asset Allocation panel
- It's good as always
- Keith Loveland
- Length of Stanasolovich presentation Wednesday afternoon; 100+ slides, simply too much
- Location was poor. Try St. Paul or southern metro location.
- Location would prefer not to have in downtown Minneapolis and pay high price for parking
- Louis Stanasolovich (42)
- Lou – 200+ slides; content would have been good if boiled down
- Lou – inability to even see the slides hindered understanding – disappointing to me
- Lou – incorrect info
- Lou – poor; presentation did not relate to title; too many slides. Focus?
- Lou – presentation on Wednesday night needed to be consolidated and needed a better focus. A small factor is that the main room was fairly cold.
- Lou – terrible, to put it politely
- Lou – too many slides; not on topic until the latter portion of presentation
- Lou – too many slides; sped through without delivering key points
- Lou – too much data without specific application
- Lou – very weak presentation; not up to association standards
- Louis Stanasolovich – topic could have been done in a half hour; felt like a waste of two hours
- Lunch
- Lunch – both days (2)
- Lunch – long line; food not very good

- Lunch process too cumbersome Wednesday
- Maybe tell people where to park and validate parking? (I had to think hard about the 2<sup>nd</sup> item to improve.)
- No diet Mountain Dew
- No technology/marketing booths or speakers
- Not being able to leave my materials, etc at the table during breakouts
- Not enough question and answer time allowed
- Not enough variety in topics
- Not having a speaker at lunch for credit
- Nothing (3)
- Only one screen in main room
- Parking was a challenge; both days had full parking ramps. Probably just a new problem.
- Parking was full and had to wait
- Ran one hour too long
- Reception was so-so; could have been longer and better food.
- Room is always cold
- Room layout was poor. In the past, you have had long tables. These are preferable over round tables.
- Roy Diliberto
- Sandwiches two days
- Seating arrangement
- Shorten breaks, fewer breaks, 5:30 pm is too late to end
- Slides often not legible
- Some presentations could have been a little shorter
- Speaker yesterday – Lou Stanasolovich – challenging to sit for 2 hours without a break. Lou talked at the group. It was extremely difficult to learn and use his information in a meaningful fashion.
- Start and end time – rush hour traffic
- Start time too early for me – was late both days because I need to drop kids off at school
- Table arrangements this year
- The food was terrible; cold sandwiches and chips! Very cheap!
- The presentations should be related our business
- The project is too small for most people to see. We need a large project in the middle of the room in order to see the charts.
- There wasn't a sit-down lunch
- Thursday's final speaker too long and there could have been another breakout session
- Too heavy on "life planning"
- Too much "life planning" speakers
- Too much life planning; one speaker is good
- Two-part sessions were in different rooms
- Veres was disappointing this time; I've seen him better.
- Very good!
- Visual – have a 2<sup>nd</sup> screen midway back in the room
- Way overdid life planning; essentially 3 major speakers – 1 subject
- Wednesday – poor speakers in AM and closing

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

- A few more advanced planner breakouts would be good
- A few speakers had too much time; i.e., Louis Stanasolovich spoke way too long. You should have more breakout sessions.
- Allow more time for economist panel.
- Better facility – bigger room with double screen and taller stage
- Better location
- Better lunch options (3)
- Better speakers – motivator Walter Bond?
- Bottles of water available
- Concentrate on great speakers with pertinent topics
- Continue bringing in quality speakers
- Continue to focus on bring excellent presenters
- Different way to do lunch – don't need a big, hot lunch, but prefer to be served or to have a higher quality buffet
- Discuss to presenters to have tactical application for their breakout sessions
- Do not overlap same speaker topics (veres, Diliberto, Anthony). One is good enough or two max.
- Don't need 3 presentations on financial life planning
- Doug Lennick as a speaker
- Estate planning flow charts
- Fewer breaks; get out earlier on Wednesday

- For breakouts, make sure it's not a product pitch or a how smart I am presentation
- Go green. No water bottles on breaks/meals
- Great job!
- Hard to improve on this year's symposium
- Have all handouts in book
- Have one sit-down lunch next year
- Hot food for reception
- I would have liked to attend Estate Planning breakout, but took Ethics course
- If doing sandwich lunch, reduce 2<sup>nd</sup> day time to get us out ahead of traffic; don't need an hour to eat a crappy sandwich.
- Keep it the exact same
- Keep the really good speakers coming back
- Lunch and organization of lunch lines
- Meals were poor
- More buffet tables for lunch
- More on topics such as tax planning (both income and estate/gift)
- More screens if large room
- More varied sessions
- More variety in topics
- More visuals during presentations
- Move us out of the basement
- None – everything was wonderful
- Not more than two presentations on one topic (3 on life planning this year)
- Not scheduling the economist panel during the new financial planner panel; the new FA really need to know the beneficial economic info.
- Nothing – sorry I couldn't make the reception/dinner!
- Nothing specific; excellent Symposium. I'll be here again next year!
- Overall a good Symposium
- Plated lunch rather than the lunch line
- Prize drawing before afternoon program
- Put up one more screen to view half way back
- Recycle pop and water
- Refill water on tables more often
- Ring bell 3-5 minutes before start time
- Salad or vegetable tray option with lunch
- Shorten the first day by an hour or so
- Shorter breaks and longer lunch
- Technology/marketing booth or speaker
- This was a great Symposium
- Timing of speakers – more time taken to consider the amount of information and style of information at various times of the day; eg Lou Stanasolovich could perhaps have been placed in am, not last thing.
- Validate parking
- Water on tables in AM (ours was dry by 8 am)
- Well organized; thought out.
- Would like to see more involvement of fund sponsors involved in presentations
- You/the FPA does a good job every year
- From committee perspective – timer/handler should sit in front/middle so speaker can see signs
- Put computer near speaker podium so can see slides/computer at the same time as presentation
- Better signage for registration area – people were having trouble finding it
- Attendees did not remember they selected "small" blue books and were upset when didn't have handouts
- Chimes start earlier and overhead announcements (big area) about getting started

#### General Comments:

- Coffee cold
- Excellent overall!
- Excellent symposium
- Following Bob V.'s presentation, during break I heard this comment a few times: opening session should be a more dynamic speaker and entertaining subject.
- Food was great
- FYI, the charge for parking at the convention Center went up to \$16 from \$10 last year. Appears that there is no longer event parking. I heard of number of comments on this.
- Great overall!! Thank You!
- Great event/experience (3)

- Great Job – Thank You!
- Great job overall! Look forward to next year.
- Great job. Thanks for all of your hard work.
- Great overall session! Thank you to the Symposium Committee for your hard work!
- I came early for the full sessions but couldn't imagine having to sit in back of room. Would be hard to see. Break out rooms weren't big enough either.
- I had a great time at the conference this year.
- I liked the networking time and exhibitors
- I'm very impressed with the Symposium. I try not to miss any years – keep up the good work.
- It gets better every year
- It was very good, thank you FPA MN & Symposium Committee!
- Keep bringing in name speakers
- Keep the Symposium on Wednesday and Thursday – middle of the week
- Liked lunch format – no speaker and chance to interact with peers
- Main room is too cold, temperature wise
- My first symposium and I was impressed.
- Need low net worth planning
- Outstanding again! Thanks to the committee!!
- Overall, it was so-so. If you have a dynamic speaker on Thursday afternoon, more people might hang around. The bingo card is a bit juvenile. I'd suggest that you get rid of that. Offer door prizes to everyone.
- Repeat the biographies with each section and have a blank page for notes
- Room temperature was perfect
- Round tables very much better than the long tables
- Thank you
- Thank you for all the work and all the details!
- Thank you FPA!
- Thanks for having soda available at all times
- Thanks for putting this together!
- The bingo works in getting people to visit sponsors. Keep doing it and encourage sponsors to raffle something.
- The panel is an excellent tradition (economic overview)
- This is my first symposium and I thought it was great. A lot of useful info I will take from this.
- Thoroughly enjoyed participating in my first conference
- To have Louis Stanasolovich and his slides as a mean meeting (not a breakout) was a major mistake. He wasn't the problem; FPA should not have scheduled him.
- Very good overall. Nothing is every perfect, but this is close.
- Very good symposium overall. Thank you FPA for the scholarship (Luke Wacek)
- Very well organized – thanks to the committee and Bonnie and staff
- Very well organized. Good programs and information. Thank you.
- Very well run! Excellent communication throughout
- Well done
- Well organized
- Well organized; thought out
- Wish I had some of the materials in my packet – so sick of this “green” mentality – not always appropriate or valid

**I am interested in serving on the Symposium Committee:**

- John Bergstrom, [john@cardinalwealth.net](mailto:john@cardinalwealth.net), 952-746-4700

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

- Karen D'Aloia, [Karen.daloia@tnjourney.com](mailto:Karen.daloia@tnjourney.com), 651-735-5878
- Louisa Hext, [louisahext@gmail.com](mailto:louisahext@gmail.com), 612-290-8291
- Michael Pfeifer, [mike.pfeifer@pacificliflife.com](mailto:mike.pfeifer@pacificliflife.com), 612-708-6798
- Julianne Poggeman, [jmpoggemann@gmail.com](mailto:jmpoggemann@gmail.com), 715-892-0235
- Bill Wixon, [wixonadvisors@comcast.net](mailto:wixonadvisors@comcast.net), 763-543-1819

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

- Karen D'Aloia, [Karen.daloia@tnjourney.com](mailto:Karen.daloia@tnjourney.com), 651-735-5878
- Robert Hengelfelt, [rhengelfelt@focusfinancial.com](mailto:rhengelfelt@focusfinancial.com), 952-591-9770 x318

**Refer a new annual partner and receive a Free Pass:**

- Greg Snider, Wells Fargo, [Gregory.n.snider@wellsfargo.com](mailto:Gregory.n.snider@wellsfargo.com) (submitted by Aimee Bauman)
- Coleman Cullins, The Standard (call James Schmidt for contact information)
- Kevin Johanson, LPL Financial, [kevin.johanson@lpl.com](mailto:kevin.johanson@lpl.com) (submitted by Nancy Swanson)
- David Heitkamp, Focus Financial, 952-225-0312 (submitted by John Layton)

## Mitch Anthony – Financial Life Planning

| Rating <b>3.96</b> out of 4.0                     | 4  | 3  | 2 | 1 |
|---|--|----|---|---|
| <b>Thursday • 351 evaluations</b>                 |  |    |   |   |
| Program content 3.947                             | 323  | 16 | 1 | 0 |
| Presentation 3.958                                | 329  | 10 | 2 | 0 |
| Learning objectives met?                          | 316  | 22 | 1 | 0 |
| Materials accurate?                               | 306  | 26 | 2 | 0 |
| Handouts/av satisfactory?                         | 291  | 39 | 3 | 0 |
| Effective presenter? 3.976                        | 334  | 6  | 1 | 0 |
| Appropriate time allocated?                       | 312  | 24 | 3 | 0 |
| Facilities/tech equip appropriate?                | 286  | 51 | 3 | 0 |
| Presentation was:                                 | Basic: 43 Intermediate: 177 Advanced: 102  |    |   |   |
| How often would you like to hear Mitch speak?     | Next Year: 231 Every Few Years: 107 Once is Enough: 2  |    |   |   |
| How often would you like an update on this topic? | Next Year: 223 Every Few Years: 100 Once is Enough: 4  |    |   |   |
| Wants additional information:                     | <p>Mary Adamski, Thomas Alf, Terance Amundson, Charles Anderson, Jennifer Arps, Phil Barnhill, Dana Basballe, Paul Basballe, Karen Becker-Gemmill, David Beissler, Philip Berg, John Bergstrom, Lora Bettendorf, Thomas Bird, Robert Bjork, Paul Block, Charles Blossom, Colleen Hartmon Bollom, Stephen Bowman, Douglas Box, Gerald Brennan, Dana Brewer, Curtis Brock, O. Brown, Lucas Bucl, Steven Bullert, Alexander Bush, Leslie Cadle, Sharon Calhoun, Robert Callahan, JoVayne Cappa, Barclay Carriar, Ryan Carruth, Leo Carton, Rachelle Chase, Kathy Chen, David Clausen, Jennifer Cords, Dan Corey, Robert Cowin, David Daline, Karen D'Aloia, Kathryn Dangers, Larry DeGraaf, David Dresbach, John Dritz, Ford Droegemueller, Mark Edlund, Robert Eichten, Kathleen Elbert, Byron Ellingson, Bruce Ensrud, Philip Erickson, Ronald Evans, Lori Fick, Stephen Fischer, Andrew Fishman, Kris Fitzer, Larry Flanagan, Jill Floden, Noelle Follen, Georgette Frazer, Don Fulton, Peter Gasperlin, Brenda Gempler, Daniel Getsch, Susan Gherity, Dennis Gianoli, CarlaAnn Goedtke, James Goedtke, Alexander Gonzalez, Todd Gruenig, Kurt Gunderson, John Gustavson, Anthony Hallada, Jason Hallonquist, Travis Hansberger, William Hansen, Scot Hanson, Paul Hassing, Anita Hawks, Benjamin Hayes, Lynn Hedrick, Pamela Heimdal, Keith Hein, Robert Hengelfelt, Kevin Hermening, Michael Hess, Steven Hess, John Hinz, Lori Hoefener, James Householder Jr, Shawn Jacobson, Jonathan Jaranson, Craig Jergenson, Daryl Johnson, Cindy Jones, D. Alfred Jones, Thomas Jones, Karin Jordahl, Sharon Jordahl, Cathy Juilfs, Thomas Karp, Nadia Keric, Michael Kobs, Marc Kowalski, Kay Kramer, Kenneth Kramer, Rebecca Krieger, Nicholas Kruell, Laura Kuntz, Debra Kuper, Gregorie Kvilhaug, Gary Lage, Timothy LaPean, Jacqueline Larson, Douglas Last, Michael Lauer, John Lawien, Robert Lawson, James Ledbetter, Stephen Lee, Paul Light, Eric Lind, George Loomis, Brenda Lowe, Jerry Lund, Dean Maschka, John Mazzara, John McEwen, Jon Melander, Thomas Menzel, Kristi Mertens, Joseph Miller, Norman Mitchell, C. Buzz Moen, Eric Moleski, Louise Monahan, Noel Moore, Brent Mueller, Eric Munkeby, Timothy Munkeby, Arlene Myers, Daniel Myers, Matthew Nelson, Lisa Nesser, Royce Nies, John Oberg, Scott Oeth, James O'Halloran, Steven Ohm, Gary Oliver, Kenneth Olson, Steve Olsonoski, Anthony Parr, James Patineau, Mark Pehrson, Michael Pfeifer, Joseph Pitzl, Dana Pollard, Greg Prokott, Thomas Ratelle, Mark Rekow, Peter Rekstad, Michael Ricci, Timothy Riley, Reed Rinderknecht, Douglas Ritter, Rodney Roath, Tammy Robbins, Lauri Salverda, Jeremy Schmidt, Peter Schmitz, Kent Schutte, John Schwalbach, Benjamin Setterlund, Tenielle Shallman, Gene Shavlik, Scott Simpson, Michael Sipe, Kent Sorenson, Fred Sowatzka, Diane Spearin, Mark Stadlander, Cheryl Starman-Coombs, Robert Steffen, Paul Stein, Joe Swanson, Nancy Swanson, Andrew Tate, Dean Tesch, David Thesing, Jeffrey Thorup, Gerald Turbes, Cynthia Turkington, Timothy Valen, Mark Veurink, Bruce Wagner, Ronald Wall, Rosemary Ward, Kathryn Waters, J Kyle Watkins, Lou Welter, Nate Wenner, William Wenzel, Damian Winther, Jean Wolfe, Linda Zimmerman</p> |    |   |   |

### 1) What did you like most about the presentation?

- Absolutely wonderful – he gets it!
- All (2)
- Applicable and actionable
- As always – insightful, meaningful

- Authentic, vivid
- Awesome topic, presenter, video
- Awesome!
- Best description of life planning in a very easy turnkey approach; life changing; practice changing
- Best presentation this year!
- Best yet
- Book info; access to website
- Cash in the hat (2)
- Challenging us to be disciplined in financial life planning. I heard Mitch about six years ago and was suspect if he had heart – now I know that he has heart!
- Children's book/video; sharing his philosophy; sharing tangible tools
- Clarity, simplicity, topic, approach
- Clear presentation
- Concept
- Educating and entertaining; great video
- Effective communication; kept me engaged in presentation
- Energetic, relevant, helpful
- Energy, style, personality
- Enlightening
- Enlightening and reinforcing at the same time
- Everything! (7)
- Everything – a terrific presenter; very profound and resonating!
- Everything – especially philosophy – Cash in the Hat
- Everything – most valuable part of the symposium. I hope next year I can say that it changed my business and life!
- Everything – outstanding
- Everything! This was a great presentation! One of the best I have ever seen! Thank you for having Mitch at this year's symposium!
- Excellent – thank you!
- Excellent new topics and what is important to discuss with clients
- Excellent practical advise
- Excellent presentation – highly inspiring and motivating!
- Excellent presentation/presenter! (5)
- Excellent speaker; really came away with some great ideas
- Excellent talk; well done
- Excellent! Great Value!
- Excellent! (3)
- Excellent, engaging speaker
- Excellent, thought provoking, challenging and did I say excellent
- Fabulous!
- Fantastic – grounds us in what should be done!
- Fantastic suggestions on working with clients!
- Fantastic. He makes me feel like I need to open my eyes to what I might be leaving out of my meeting.
- Fast paced, but real; humor
- Good presenter, good subject matter
- Good sense of humor; engaged audience
- Good speaker
- Good, effective communicator
- Great (2)
- Great attention getter
- Great communication; great content
- Great Dr. Seuss DVD on \$; best presentation – great delivery, good materials, important message
- Great foresight
- Great ideas; great presentation; practical tools – Thank you!
- Great insights communicated extraordinarily effectively
- Great job!! Thank you for the 3 months!
- Great lines, great humor
- Great message and free tools!
- Great message!
- Great presentation/speaker! (4)
- Great presentation; great suggestions
- Great speaker – blew away all expectations
- Great speaker and content

- Great speaker with good information – excellent presentation!
- Great speaker! Speaks from the heart.
- Great! (4)
- Great, advanced, thought-provoking
- Great, refreshing
- He could have been a pastor! Excellent speaker.
- He gets it. He has thought it through. Maybe the best presenter. I've heard him before; today he was on his game. The best presenter I have heard - R...ts Nick Murray!
- He got to the heart of the “non-numbers” part of what we do
- He is a great speaker and gets it!
- He is a great speaker and his stories really illustrate his meaning
- He really got to the audience and connected with them
- He thinks with his heart; then he bases his presentation on that thinking process
- He understands what people need and want from their financial planner. He lives and breathes it. Great presentation.
- He was (is) excellent
- He was great! Entertaining – Relevant
- He was the best speaker so far. Best motivation so far.
- His “where did you get started?” intro. My dad committed suicide and this resonated with me.
- His existential approach to life planning
- His integrity, presentation skills, relevant examples
- His message
- His passion and caring for what he does and helping people
- His passion!
- His stories and how they related to his format
- His story and client stories. Thanks for sharing the life stories of your presentation!
- Holds interest, uses humor well; presentation thought through
- Humor and content
- Humor and relevancy
- Humor and sincerity
- I liked his message about the hell lite and understanding client's transitions.
- I thought I knew my client...
- I thought Mitch was the best presenter of the symposium. His stories were great and captivating and funny (some of them), but they all had an excellent message and application.
- Inspirational
- Inspired hope for everyone; humor; stories – Mitch, you were awesome!
- Interesting idea on how to learn more about your clients/prospects
- It was awesome!
- It was personal for him; showed how important it is to get
- Just a few, well-motivated, inspirational points; his generosity
- Just great! Provided us with a way to communicate our value.
- Life experiences
- Life Tracker
- Life transitions; The Cash in the Hat
- Looking at the personal side. Enthusiasm!
- Made my think – hard
- Marvelous speaker. Right on in terms of thinking and content.
- Meaningful and outstanding approach to an important facet of our business
- Motivational; helps us enter into the “professional space” of our clients
- My focus
- Nice job, Mitch. I have heard you multiple times and each time it has been great.
- Nice overview of a system to help client relationships!
- One of the best
- Outstanding in every way
- Outstanding! (2)
- Passion, simplicity, believe him. Thanks!
- Personal and other stories
- Personal nature – opening up own life store; great presenter
- Personal, easy to understand, real life – now info. He is excellent!!
- Power stories!!
- Presentation – interesting – lively – humor; very valuable
- Presentation style and content
- Presented a new “formula” for success

- Providing actionable items to take back and implement in transition planning with my clients. Great presentation!
- Return On Life concepts (3)
- Real life examples
- Real life stories. Solid research basis for creative ideas presented in a compelling and easy to understand manner.
- Real!
- Related to me
- Relevant
- Right on M.A. track
- Simple message; great stories
- So sincere
- Specific details on how to discuss topics with clients
- Stories, energy, humor, video
- Stories, tools
- Stories, tools to use with clients
- Substance with humor – great delivery – Thanks!
- Summary report – P.R.O.F.I.T
- Thanks – good!
- The “questions” to ask
- The entire thing
- The ideas!
- The message
- The questions he gave us to ask our clients; humor; applicable to what we do
- The straight talk about our profession I needed to hear
- This was great – your presentation made my convention
- Tremendous confidence, insight, rapport
- Usable/implementable topic and strategies
- Valuable, insightful, practical
- Very applicable
- Very applicable to my practice
- Very clear explanation of financial life planning
- Very effective and motivating speaker
- Very effective!!
- Very insightful
- Very inspiring
- Very interesting with great content
- Very motivating; great stories and examples; engaging – thank you for supporting our FPA chapter
- Very motivational and “feel good”
- Very personal and related issue to each advisor
- Very practical
- Very relevant
- Very well done. Very compelling; loved the movie
- Very, very good!
- Wonderful. I like to think I practice what he teaches.
- Wonderfully entertaining and insightful. Great presentation!

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

- Come back again
- Condense to 90 minutes
- Don't lose this level of passion
- Engage the audience
- Great info delivered well!
- He doesn't need my help
- He's one of the best!
- His suggestions
- Keep up the great work (2)
- Maybe just a little bit less of a sales slant
- Maybe talk a little more about his business, but the nature of his presentation didn't really make that necessary
- More specifics on process
- More time ... I could listen all day.
- No need for improvement; most effective

- Nothing I could suggest would improve this professional's presentation
- Nothing, outstanding presentation!
- Nothing; Absolutely nothing (several)
- Nothing; he's a very strong speaker
- Screen was a little small; use two screens to make it easier to see (3)
- The tidbits of wisdom in writing; could listen/interact with him often

## Ann Burns – Advanced Estate Planning

| Rating 3.59 out of 4.0                            |  | 4   | 3  | 2  | 1 |
|---|--|-----|----|----|---|
| <b>Wednesday • 146 evaluations</b>                |  |     |    |    |   |
| Program content                                   | 3.549  | 85  | 53 | 6  | 0 |
| Presentation                                      | 3.542  | 82  | 55 | 5  | 0 |
| Learning objectives met?                          |  | 77  | 56 | 11 | 0 |
| Materials accurate?                               |  | 78  | 55 | 8  | 0 |
| Handouts/av satisfactory?                         |  | 65  | 57 | 14 | 1 |
| Effective presenter?                              | 3.667  | 102 | 41 | 4  | 0 |
| Appropriate time allocated?                       |  | 70  | 57 | 14 | 2 |
| Facilities/tech equip appropriate?                |  | 64  | 57 | 11 | 3 |
| Presentation was:                                 | Basic: 4 Intermediate: 45 Advanced: 88   |     |    |    |   |
| How often would you like to hear Ann speak?       | Next Year: 78 Every Few Years: 56 Once is Enough: 4  |     |    |    |   |
| How often would you like an update on this topic? | Next Year: 91 Every Few Years: 42 Once is Enough: 0  |     |    |    |   |
| Wants additional information:                     | Charles Anderson, Pierre Asanchev, Paul Block, Colleen Hartmon Bollom, Stephen Bowman, Lucas Bucl, Sharon Calhoun, Barclay Carriar, Leo Carton, William Clark, Robert Cowin, Sarah Darr, Ford Droegemueller, Byron Ellingson, Gordy Graham, Lynn Hedrick, Genell Hollahan, Christina Hughes, Michael Kobs, Debra Kuper, Michael Lauer, Brenda Lowe, Jerry Lund, Thomas Menzel, Joseph Miller, Richard O'Connor, Scott Oeth, John Rehl, Timothy Riley, Tammy Robbins, Lauri Salverda, Tenielle Shallman, Greg Snider, Fredrick Sundquist, Andrew Tufford, Rosemary Ward, Jean Wolfe |     |    |    |   |

### 1) What did you like most about the presentation?

- Knowledgeable, good communicator
- Clarity – structure – professionalism
- She is a great speaker; takes complicated material and makes it sound simple
- Very smart, well spoken
- Superb!
- No PowerPoints; nice for a change
- Excellent
- Perfect!
- Very knowledgeable, easy to understand
- Great examples
- Effective communicator
- She explains things quite well
- Clear and focused
- Very good (3)
- Enthusiasm, knowledge, conviction, humor
- Explained / understood!
- Thorough, passionate
- Technical knowledge
- Great job of summarizing the estate tax situation
- Knowledge and conviction
- Explained in simple terms to help understand details of trusts
- Reminding us that most do estate planning for personal goals, not for taxes
- Overview of three advanced techniques
- Presents advanced material in a clear manner
- Smooth and clear
- Good strategies to know about – just don't have many clients who use or need them

- Perhaps some pictures (charts and graphs) of the examples would be helpful to visualize strategy
- Easy to listen to; very knowledgeable, explained well
- Clear, good speaker; focused on a few topics clearly
- Higher level information; good speaker
- Very knowledgeable (2)
- She's a terrific speaker, extremely understandable
- Well done, Ann – I always enjoy your presentations
- Great speaker, clear
- Thorough, great speaking voice, detailed
- She was knowledgeable about the subject matter
- Discussing popular advanced estate planning opportunities in the current low interest rate environment
- Very knowledgeable on this topic; very good with answering member questions
- Her style; her tone, body language. I liked the examples that were used to illustrate the concept
- Clear explanation; made complex transactions seem simple
- Varied concepts/tools
- Good review
- Very good speaker, very knowledgeable
- Good speaker
- Covered complex topics well; explained well
- Great, informative presentation!
- Realistic and good explanation in layman's term so we can follow
- Very capable technically
- Her communication style is excellent

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

- Written illustrations
- Perfect as it is
- Great topic; need more time
- Possibly examples of each product usage
- More room in notebook for notes
- Visuals
- Flow charts/pictures would complement the presentation nicely
- PowerPoint that shows all that goes into trusts, etc.; a lot of info and would be easier if saw how worked
- More time to go over materials
- Use chart for estate planning tools
- The handouts were a little too condensed
- Too little time to cover all three – may be better to do more detailed session on one trust at a time
- Visual aids
- More with general design's on retirement plans, w/ QTIPs, etc. Various types of flexible credit shelter planning: QTIPs, etc., but other advisors may disagree.
- More for the < \$5.0M net worth crowd
- Lots of detail with very little for one to look at. As a visual learner, it was sometimes difficult to follow.
- Some graphics would be helpful
- Nothing Ms. Burns could do ... material was a bit over my head for where I am in my practice
- I am not sure what percentage of attendees are CFPs, but besides her updates on congress/IRS potential action, there was no new information for a CFP.
- Not enough time; felt like a "brain dump"
- Use PowerPoint
- Use visuals / PowerPoint to enhance memory
- Add overhead or screen device
- More white space for notes on handouts
- Handout available on entry
- Use more specific case studies with actual measurable economic outcomes
- Would have liked a more depth; more variety of strategies discussed

**Roy Diliberto – Planning from the Inside Out**

| <b>Rating 3.63 out of 4.0</b>             | 4     | 3   | 2   | 1  |   |
|---|-------|-----|-----|----|---|
| <b><i>Wednesday • 383 evaluations</i></b> |       |     |     |    |   |
| Program content                           | 3.608 | 245 | 110 | 15 | 2 |
| Presentation                              | 3.582 | 242 | 108 | 21 | 2 |

|   |  |     |    |   |
|---|--|-----|----|---|
| Learning objectives met?                          | 218  | 135 | 18 | 2 |
| Materials accurate?                               | 225  | 121 | 16 | 2 |
| Handouts/av satisfactory?                         | 215  | 133 | 17 | 2 |
| Effective presenter? 3.691                        | 277  | 78  | 14 | 3 |
| Appropriate time allocated?                       | 220  | 125 | 24 | 4 |
| Facilities/tech equip appropriate?                | 216  | 131 | 12 | 3 |
| Presentation was:                                 | Basic: 68 Intermediate: 209 Advanced: 77   |     |    |   |
| How often would you like to hear Roy speak?       | Next Year: 81 Every Few Years: 236 Once is Enough: 31  |     |    |   |
| How often would you like an update on this topic? | Next Year: 126 Every Few Years: 203 Once is Enough: 22   |     |    |   |
| Wants additional information:                     | Terance Amundson, Charles Anderson, Lori Anderson, Phil Barnhill, Dana Basballe, Paul Basballe, John Bergstrom, Paul Block, Charles Blossom, Gerald Brennan, Dana Brewer, Curtis Brock, O. Brown, Lucas Bucl, Steven Bullert, Leslie Cadle, Sharon Calhoun, Barclay Carriar, Ryan Carruth, Leo Carton, Del Cerney, Kathy Chen, John Conlin, Dan Corey, David Daline, Lynn Daly, Sarah Darr, Robert Eichten, Kathleen Elbert, Byron Ellingson, Nathan Faith, Steven Finkelstein, Stephen Fischer, Joyce Franchett, Georgette Frazer, Jill Frey, Don Fulton, Susan Gherity, Dennis Gianoli, CarlaAnn Goedtke, James Goedtke, Gordy Graham, Paul Greengo, Joseph Grochowski, Jason Hallonquist, Bridget Handke, William Hansen, Scot Hanson, Linda Harmon, Benjamin Hayes, Keith Hein, Kevin Hermening, Lori Hoefener, James Householder Jr, Christina Hughes, Jonathan Jaranson, Craig Jergenson, Eric Johnson, Joel Johnson, Thomas Jones, Cathy Juilfs, David Jungquist, Thomas Karp, James Keating, Todd Kelzenberg, Nadia Keric, Michael Kobs, Kenneth Kramer, Rebecca Krieger, Gary Lage, Douglas Last, Michael Lauer, John Lawien, Mark Ledson, Paul Light, Eric Lind, Peter Ludwig, Rick Lueck, Jerry Lund, Brian McKnight, Thomas Menzel, Joseph Miller, Stephen Moser, Matthew Nelson, Royce Nies, John Oberg, Scott Oeth, Steven Ohm, Gary Oliver, Diane Park, James Patineau, Mark Patridge, Mark Pehrson, Michael Pfeifer, Dana Pollard, Thomas Ratelle, John Rehl, Mark Rekow, Michael Ricci, Timothy Riley, Reed Rinderknecht, Tammy Robbins, Linda Roszak, Ronald Rydell, Lauri Salverda, James Sanders, Jeremy Schmidt, Kent Schutte, John Schwalbach, Benjamin Setterlund, Tenielle Shallman, Scott Simpson, Michael Sipe, Greg Snider, Kent Sorenson, Fredrick Sundquist, Joe Swanson, Andrew Tate, Dean Tesch, David Thesing, Jeffrey Thorup, Cynthia Turkington, Mark Veurink, Ronald Wall, Anne Ward, Rosemary Ward, Nate Wenner, Teresa Wernecke, Damian Winther, Jean Wolfe |     |    |   |

### 1) What did you like most about the presentation?

- Application
- Apply to client relationship; can use today; great to revisit this subject
- Behavioral motivation, interior vs. exterior
- Best presentation for planners I've heard in 25 yrs. in financial planning – Thank you!! Outstanding!
- Bringing the emotional elements of money to the forefront of the financial planning process
- Changing the way I think about what I do
- Clear communicator
- Clear, useable information
- Client anecdotes; presentation style was really effective
- Client examples were very helpful and provided the "AHAS" on how to be effective with our clients; great presentation
- Client focus – reminder to go back to basics - people ?'s not money ?'s
- Client stories made great points
- Confirmed what I like to think I already so
- Could have made point in shorter time
- Dealing with the emotions of the client and how to get at what motivates them to do what they do
- Discover interior problems; start w/interior exploration, money questions come later
- Don't have to have answers; interior issues; thoughtful questions; stories
- Don't make assumptions; ask not only good questions, but the right/relevant questions
- Dynamic speaker; sound practical advice
- Emotional decisions are more important than financial decisions
- Energetic (2); slides simple & to the point (2)
- Engaging, entertaining, good stories
- Entire presentation
- Everything (2)

- Examples of client situations/background
- Examples/client stories; great speaker
- Excellent case examples (2)
- Excellent speaker
- Excellent topic/content
- Experience
- Fabulous! Very relevant to our profession at this point in life
- Focus on emotion, feelings & values
- Focus on what's important, not just numbers and dollar signs
- Focusing on asking right questions
- Gave specific questions to use with clients which is helpful for practical application
- Giving concrete examples of how he implements in his practice
- Good angle and very helpful
- Good group of financial planning issues
- Good job – good ideas – thought provoking
- Good material and ideas we can use
- Good points; well received
- Good PP slides, good stories, money is the servant not the master; reminding us that our role is improving the clients' lives
- Good presentation
- Good stories in backing up his lecture
- Good subject
- Good subject, but the war stories we have all lived or heard before
- Good topic
- Good visuals – good examples
- Good way to present financial planning – beyond the #'s and focused on peoples goals & desires
- Got an A+
- Great anecdotes to hammer home point of Quantitative, factors are not the most important
- Great concepts of questions to ask – feeling about \$
- Great examples; passionate – kept me engaged
- Great handouts on various good questions
- Great lively information; thought provoking
- Great questions (2)
- Great real life stories
- Great stories
- Great story teller (3) – terrific for framing client issues
- Handouts – Topic – Enthusiasm (3)
- He actually shared his question in the handout; he freely gave a wealth of information
- He described the process he used in reaching clients – describing values, etc; provided the questions he uses – helpful
- He gave practical ways to make clients think about money
- He made the topic very interesting with stories
- He's really good!!
- Heart, mind, soul
- Helpful insights into doing financial planning well!
- Helpful to some presentations I'll be giving in next 5 weeks
- His "questions"; I enjoyed listening to Roy – he made me think!
- His approach to qualitative interviewing clients before getting into the quantitative analysis & recommendations
- His passion for the topic
- His presentation to his clients and his process
- His real life examples were interesting & useful
- His reference to Mitch Anthony materials and George Kinder questions
- His stories were great (examples of interior Issues that affect discussions about money); interior discovery is very good
- How he incorporates ideas into his practice
- Human approach – qualitative vs. quantitative
- I can identify many ideas I WILL implement in my firm
- I can relate to everything he talked about; he is absolutely one of the premier financial planners in the business; I have been in the business for over 25 years and this presentation was one of the best – Thank you, Roy, I will incorporate additional ideas to my practice.
- I like his approach of interior first, the rest will follow
- I liked his different perspective that fous on the interior/psychological goals/value system of clients
- I loved the client stories

- I think Roy's stories/real life examples are great and his humor breaks the monotony in the room
- I value the way a practice planner such as Roy can help me communicate more effectively! Thank you!
- Improving qualitative components to planning vs. more quantitative
- Insight to understanding interior issues
- Insightful material
- Insightful questions, showing alternate ways to gather information
- Interesting life stuff
- Interesting way to approach planning; adding value
- Interior planning focus
- Internal dynamics
- Introduce the idea of planning based on clients "internal" needs
- It has great that Roy was here; I've read a couple of books and he is well-known in the profession; I'm glad he was on the schedule
- It is usable in our practice – it reinforces what we currently do
- It shows you like what you do; don't retire
- It's a great topic & not enough advisors are good at this skill
- Learning more about a different path to follow – a different set of questions
- Live case stories & interior discussions
- Lively
- Logical speaker – more about life than \$'s
- Lots of good structure in teaching us his process
- Love the concept that quantitative is not all to financial planning
- Loved his stories and enthusiasm – great speaker
- Made me realize that I need to make some changes with my practice
- My current focus
- Nice stories
- Not much
- Opportunity to see how he does this process beyond a high fly over
- Personal stories; passion for subject
- Practical approach – important methodology
- Practical questions to use with clients
- Practice examples
- Practitioners perspective
- Provided acknowledgement on process we use with clients & can grow from
- Provided great information
- Psychology of financial planning; working or interior issues
- Psychology of financial planning; workings or interior issues
- Questions
- Questions (interior) related to \$
- Questions for clients
- Questions to ask
- Questions to ask clients to get important info about them, what they want, & who they are
- Real experience
- Real life examples
- Real life examples (6) of information implemented (2)
- Real life examples of clients to the planning process
- Real life experience; transparency
- Real life situation – makes us think how it will work in our practice
- Real life stories are always helpful in driving home a point
- Real world examples of interior issues that affect decisions about money
- Resounded the fact that we are psychologists!
- Sample questionnaire, Q & A period was useful
- Sharing of questions to ask clients; explanation of interior vs. exterior issues
- Significance
- Simplicity to better learning
- Some good actual client stories, good overview of what we should be doing
- Some practical/implemental ideas
- Specific example he have regarding the power of questions
- Stories (15) and great take aways to apply
- Stories about client experiences
- Stories bring his message to life
- Stories drive home key points; I will be able to apply some of his approach in my role
- Stories of real life experiences with clients

- Talked more about purpose than performance; our industry has gotten to numbers based and less about goals/family; great talk!
- Thank you for your list of questions and your ideas
- That it is not about saving taxes – important to get to interior first
- This is the direction we need to go
- Thought provoking
- Thoughtful – from Roy's perspective & as a catalyst to review my practice & processes of doing business
- Three scenarios & the interior/exterior (2)
- Topic was great, the stories made it excellent story selling brings it all home for the audience
- True goals of planning, his questions to ask clients(4)
- Used a lot of examples that made the material meaningful
- Used examples well; materials/presentation was a nice step by step process to explain now
- Validating my own experience of working with clients on an “interior” basis
- Very dynamic speaker
- Very effective, entertaining presentation
- Very entertaining speaker, lots of examples, easy to follow in book
- Very good
- Very personal, humanistic approach to planning
- Very practical, applicable to my practice
- We do focus on interior goals but I love his specific questions and using them as “homework”
- Wisdom & insight
- Wonderful refreshing comments about setting fees
- Wording and timing of the questions; the idea of “true wealth”

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

- A bibliography of what he reads
- Coordinate message with other speakers; both Roy and Bob Veres had a same key point (3 George Kinder questions)
- Could expand to longer session
- Discuss briefly the training programs available for planners to delve deeper into Financial Life Planning
- Discussion of “Safe Withdrawal Rates” was pretty unclear
- Do it more often! I will recommend that our firm contact him to speak at our annual convention
- Do you have or are you willing to share your processes? I have no suggestions.
- Felt like it moved too slow; too much overlap with Veres & Anthony topics?? – could have done this in 60 min.
- Fewer stories, be more interactive with audience
- Fine the way it is
- Get a speaking coach; great opportunity to take to higher level
- Get over 2008 & move forward
- Get rid of the blue power point slide J/K
- Good job
- Good point, but I have done this for years, don't assume we haven't
- Good presentation
- Good response to questions – How do you convince other planners to increase fees? Reminding planners that it is personal
- Great work – only thing, may be nice to have, would be more details on his presentation in the slides
- He does a great job without my input
- He might consider actually doing a “role playing” presentation
- He need to do something different, but not sure what it is, it got long!
- How to do this with lower net worth clients
- I am engaged in the life planning discussion so all the lead up to why to embrace Interior Dialogues was too long for me
- I may be the only one that thought this, but I felt he was arrogant
- I think this could have been presented in 45-60 minutes
- I'd like to hear him again any time he thinks he has something to say
- I'm inspired
- Incorporate some of Doug Lennick's “emotional intelligence” elements
- It is time he retire from presenting on this topic; it appears he has been away from actual financial planning for too long & has lost touch with reality
- Keep using PowerPoint
- Make it shorter
- More client answers that he has received to his questions so we can see the result more
- More details about the renewal process, and ongoing planning

- More info on how you use these concepts in your practice. Question and answer portion was really good in the regard
- More stories
- More structure
- More time (2)
- Mr. Diliberto's comment: "It's like asking a husband; how often do you hit your wife." – was a very poor choice of words, he meant it in a funny way, but it was insulting and in poor character; I expect more from a speaker
- None – excellent as is. Thanks!
- None (several)
- Nothing, excellent presentation
- Please allow for insight to your process
- Please don't look at slides & read them to use – you wrote it, you know it, so add value
- Provide additional detail on the fees charged for "Planning from the Inside Out" and the practice management implications
- Put less information/questions on the power point slides so they're easier to read
- Seems he does not like Bob Veres – "slammed" him at times in somewhat of a PC way, but not very professional – may just be my take on it but left a bad taste!
- Skip over last few slides – repeat of 1<sup>st</sup> section of presentation
- Some of the slides could use more detail
- Take the discussion deeper; next time start at a more advanced level
- Too much focus & time on mistakes (assumptions)
- Too much time spent on intro fluff; could have made the pts in less time
- Use more of the stage
- Very good presentation – thank you
- Visual of example case studies – doesn't need to be pictures of actual clients, but the visual aids memory retention of the subject matter
- When his process doesn't work & why
- Would like the questionnaire he gives to them in first meeting. Unclear about how his process gets implemented.
- Would like to see the initial contact questionnaire that sent to clients

## Economist Panel – David Kelly, Jerry Webman, Rick Golod

| Rating 3.86 out of 4.0  |  | 4   | 3  | 2  | 1 |
|---|--|-----|----|----|---|
| <b>Thursday • 305 evaluations</b>                                 |  |     |    |    |   |
| Program content   | 3.855  | 249 | 40 | 1  | 0 |
| Presentation  | 3.869  | 252 | 38 | 0  | 0 |
| Learning objectives met?  |  | 237 | 52 | 2  | 0 |
| Materials accurate?   |  | 238 | 52 | 0  | 0 |
| Handouts/av satisfactory?   |  | 222 | 61 | 4  | 1 |
| David Kelly - Effective presenter?                                | 3.91   | 262 | 28 | 1  | 0 |
| Jerry Webman – Effective presenter?                               | 3.84   | 244 | 38 | 4  | 1 |
| Rick Golod – Effective presenter?                                 | 3.84   | 242 | 45 | 2  | 1 |
| Appropriate time allocated?                                       |  | 216 | 59 | 12 | 0 |
| Facilities/tech equip appropriate?                                |  | 212 | 65 | 6  | 1 |
| Presentation was:   | Basic: 7 Intermediate: 164 Advanced: 102   |     |    |    |   |
| How often would you like to have an Economist Panel presentation? | Next Year: 250 Every Few Years: 6 Once is Enough: 0  |     |    |    |   |
| Wants additional information from David Kelly:                    | Thomas Alf, Charles Anderson, Dana Basballe, Paul Basballe, Philip Berg, Chuck Betz, Thomas Bird, Michael Bishop, Charles Blossom, Curtis Brock, Lucas Bucl, Steven Bullert, Alexander Bush, Sharon Calhoun, Barclay Carriar, Ryan Carruth, Leo Carton, Kathy Chen, Peter Christensen, David Clausen, Jennifer Cords, Dan Corey, Robert Cowin, David Daline, Lynn Daly, Kathryn Dangers, Sarah Darr, Jeff Dekko, Bonnie Denzel, Ford Droegemueller, Mark Edlund, Kathleen Elbert, Bruce Ensrud, Philip Erickson, Chad Essman, Larry Flanagan, Jill Floden, Don Fulton, Brenda Gempler, Susan Gherity, Dennis Gianoli, CarlaAnn Goedtke, James Goedtke, Joseph Grochowski, Kurt Gunderson, Anthony Hallada, Jason Hallonquist, Bridget Handke, Travis Hansberger, William Hansen, Paul Hassing, Anita Hawks, Lynn Hedrick, Keith Hein, Robert Hengelfelt, Michael Hess, Steven Hess, John Hinz, Genell Hollahan, James Householder, Jonathan Jaranson, Craig Jergenson, Joel Johnson, Cindy |     |    |    |   |

|  |   |
|--|---|
|  | <p>Jones, D. Alfred Jones, Karin Jordahl, Sharon Jordahl, Thomas Karp, Nadia Keric, Barbara Kirby, Michael Kobs, Kay Kramer, Kenneth Kramer, Rebecca Krieger, Nicholas Kruell, Laura Kuntz, Debra Kuper, Gary Lage, Timothy LaPean, Michael Lauer, John Lawien, Robert Lawson, Eric Lind, Jerry Lund, Dean Maschka, Daniel May, Alex Mayrand, John McEwen, Brian McKnight, Joni Meilahn, Jon Melander, Thomas Menzel, Joseph Miller, Norman Mitchell, Eric Moleski, Louise Monahan, Brent Mueller, Eric Munkeby, Timothy Munkeby, Luke Murray, Arlene Myers, Daniel Myers, Joseph Nelson, Matthew Nelson, Lisa Nesser, John Oberg, Scott Oeth, James OHalloran, Gary Oliver, Steve Olsonoski, Sheri Pederson, Mark Pehrson, Michael Pfeifer, Jason Plank, Dana Pollard, Thomas Ratelle, John Rehl, Mark Rekow, Peter Rekstad, Timothy Riley, Douglas Ritter, Rodney Roath, Ronald Rydell, Lauri Salverda, James Sanders, Robert Saunders, James Schmidt, Julieann Schroeder, Scott Simpson, Michael Sipe, Kent Sorenson, Fred Sowatzka, Diane Spearin, Katherine Stienessen, Fredrick Sundquist, Timothy Swenson, Andrew Tate, Dean Tesch, Jeffrey Thorup, John Truckenbrod, <b>Hilary Van de Streek</b>, Bruce Wagner, Ronald Wall, Tom Walsh, Rosemary Ward, Lou Welter, Nate Wenner, Teresa Wernecke, David Wetterling, Damian Winther, Jean Wolfe</p>   |
| <p>Wants additional information from Jerry Webman:</p> | <p>Thomas Alf, Charles Anderson, Dana Basballe, Paul Basballe, Philip Berg, Chuck Betz, Thomas Bird, Michael Bishop, Charles Blossom, Curtis Brock, Lucas Bucl, Steven Bullert, Alexander Bush, Sharon Calhoun, Barclay Carriar, Ryan Carruth, Leo Carton, Peter Christensen, David Clausen, Jennifer Cords, Robert Cowin, David Daline, Lynn Daly, Kathryn Dangers, Sarah Darr, Jeff Dekko, Bonnie Denzel, Ford Droegemueller, Mark Edlund, Kathleen Elbert, Bruce Ensrud, Philip Erickson, Chad Essman, Larry Flanagan, Jill Floden, Don Fulton, Susan Gherity, Dennis Gianoli, CarlaAnn Goedtke, James Goedtke, Joseph Grochowski, Kurt Gunderson, Jason Hallonquist, Bridget Handke, Travis Hansberger, Paul Hassing, Anita Hawks, Lynn Hedrick, Keith Hein, Robert Hengelfelt, Michael Hess, Steven Hess, John Hinz, James Householder, Craig Jergenson, Cindy Jones, D. Alfred Jones, Karin Jordahl, Sharon Jordahl, Thomas Karp, Nadia Keric, Barbara Kirby, Michael Kobs, Kay Kramer, Kenneth Kramer, Nicholas Kruell, Laura Kuntz, Gary Lage, Timothy LaPean, Michael Lauer, John Lawien, Robert Lawson, Eric Lind, Jerry Lund, Daniel May, Alex Mayrand, John McEwen, Brian McKnight, Joni Meilahn, Jon Melander, Thomas Menzel, Joseph Miller, Norman Mitchell, Eric Moleski, Eric Munkeby, Timothy Munkeby, Luke Murray, Arlene Myers, Daniel Myers, Joseph Nelson, Matthew Nelson, Lisa Nesser, Scott Oeth, James OHalloran, Gary Oliver, Steve Olsonoski, Sheri Pederson, Mark Pehrson, Michael Pfeifer, Jason Plank, Thomas Ratelle, John Rehl, Peter Rekstad, Timothy Riley, Douglas Ritter, Rodney Roath, Ronald Rydell, Lauri Salverda, James Sanders, Robert Saunders, James Schmidt, Peter Schmitz, Julieann Schroeder, Scott Simpson, Michael Sipe, Kent Sorenson, Fred Sowatzka, Diane Spearin, Clayton St. George, Fredrick Sundquist, Timothy Swenson, Andrew Tate, Dean Tesch, Jeffrey Thorup, John Truckenbrod, Ronald Wall, Rosemary Ward, Lou Welter, Nate Wenner, Teresa Wernecke, David Wetterling, Damian Winther, Jean Wolfe</p>  |
| <p>Wants additional information from Rick Golod:</p>   | <p>Thomas Alf, Charles Anderson, Dana Basballe, Paul Basballe, Philip Berg, Chuck Betz, Thomas Bird, Michael Bishop, Charles Blossom, Gerald Brennan, Curtis Brock, Lucas Bucl, Steven Bullert, Sharon Calhoun, Barclay Carriar, Ryan Carruth, Leo Carton, Peter Christensen, David Clausen, James Clemensen, Jennifer Cords, Robert Cowin, David Daline, Lynn Daly, Kathryn Dangers, Sarah Darr, Jeff Dekko, Bonnie Denzel, James Driscoll, Ford Droegemueller, Mark Edlund, Kathleen Elbert, Caroline Emswiler, Bruce Ensrud, Philip Erickson, Chad Essman, Larry Flanagan, Jill Floden, Don Fulton, Brenda Gempler, Susan Gherity, Dennis Gianoli, CarlaAnn Goedtke, James Goedtke, Paul Greengo, Joseph Grochowski, Jason Hallonquist, Bridget Handke, Travis Hansberger, William Hansen, Paul Hassing, Anita Hawks, Lynn Hedrick, Keith Hein, Robert Hengelfelt, Michael Hess, Steven Hess, John Hinz, James Householder, Fang Huang, Jonathan Jaranson, Craig Jergenson, Joel Johnson, Cindy Jones, D. Alfred Jones, Karin Jordahl, Sharon Jordahl, Thomas Karp, Nadia Keric, Barbara Kirby, Michael Kobs, Kay Kramer, Kenneth Kramer, Nicholas Kruell, Laura Kuntz, Debra Kuper, Gary Lage, Timothy LaPean, Michael Lauer, John Lawien, Robert Lawson, Brad Leivermann, Eric Lind, Jerry Lund, Dean Maschka, Daniel May, Alex Mayrand, John McEwen, Brian McKnight, Joni Meilahn, Jon Melander, Thomas Menzel, Joseph Miller, Norman Mitchell, Eric Moleski, Eric Munkeby, Timothy Munkeby, Luke Murray, Arlene Myers, Daniel Myers, Joseph Nelson, Matthew Nelson, Lisa Nesser, Scott Oeth, James OHalloran, Gary Oliver, Steve Olsonoski, Sheri Pederson, Michael Pfeifer, Jason Plank, Thomas Ratelle, John Rehl, Mark Rekow, Peter Rekstad, Timothy Riley, Douglas Ritter, Rodney Roath, Ronald Rydell, Lauri Salverda, James Sanders, Robert Saunders, James Schmidt, Julieann Schroeder, Scott Simpson, Michael Sipe, Kent Sorenson, Fred Sowatzka, Diane Spearin, Clayton St. George, Fredrick Sundquist, Timothy Swenson, Andrew Tate, Dean Tesch, Jeffrey Thorup, John Truckenbrod, Ronald Wall, Tom Walsh, Rosemary Ward, Kathryn Waters, Lou Welter, Nate Wenner, Teresa Wernecke, David Wetterling, Damian Winther, Jean Wolfe</p> |

1) What did you like most about the presentation?

- 3 different looks at the economy
- All 3 are great presenters
- All of them – always great – Rick Golod is the best – tells it like it is
- Always a favorite – Kelly, Golod, & Webman
- Always enjoyable & informative
- Always good (2)
- Always good information – educated opinions
- Always good to hear about this
- Always great
- Always great – good humor, good material
- Always great – nice to have “same 3”
- Always great – thank you!
- As always the highlight of the conf
- David Kelly (2)
- David Kelly – marvelous presenter & story teller. Even putting accent aside – very articulate.
- Describing issues I wasn't aware of
- Different perspectives from each – discussion at the end
- Different viewpoints/opinions (4)
- Different views, difference variables, challenge thinking – current issues
- Differing view from great speakers
- Diverse, well informed opinions
- Dynamic & discussions amongst themselves
- Dynamic, interesting speakers as always – entertaining – speakers very willing to answer questions
- Easy to understand and held everyone's attention
- Enjoy panel every year
- Enthusiastic & knowledgeable speakers
- Everything (4)
- Everything – the interplay
- Excellent – great current info
- Excellent as usual – entertaining and informative
- Excellent format. Please continue to keep this
- Excellent informative & entertaining
- Excellent presentation (2)
- Fantastic – makes the entire symposium
- Good description of current environment & outlook for near future
- Good humor of speakers – great usable ideas for clients
- Good info – broken down how to relate to clients – good mix of different perspectives yet similar ideas
- Good presentation materials
- Good stuff – enjoy hearing the different thoughts & opinions
- Great (2)
- Great – thanks for coming
- Great & hones conversations
- Great always my favorite session. Please bring them all back next year.
- Great economic information
- Great info – love it
- Great insight
- Great job again
- Great panel speakers (2)
- Great part of any conference
- Great speakers
- Great to hear differing viewpoints
- Great update – mixed perspectives
- Great way to wrap up conference. Great perspectives & varied enough to keep new ideas flowing.
- Great way to wrap up symposium

- Having 3 people (vs one) – all 3 were outstanding speakers (bring them back) – combination of presentation and Q & A panel was a great format
- Highlight of the conference
- Hope to see for another 4 years
- I found it helpful, this panel, to give me insights on how to invest the clients money & how to communicate to my clients
- I would like to see a contrarian on the panel although bullish...would be nice to see opposite if possible to coordinate
- Info
- Insights, perspectives, Q & A
- It was great
- Keep them coming back.
- Keep these 3 coming back
- Key points made – loved that Jerry Webman summarized.
- Knowledge, presentation style
- Knowledgeable, energetic entertaining speakers like these guys
- Like comparison of outlooks amongst three of them
- Love it
- Love them – always great
- Nice to have an update
- Outstanding as always
- Penal approach
- Please keep bringing David, Jerry & Rick back every year
- Smart & credible
- Stimulating to different views
- Straight forward & timely information
- Superb as always – please come next year
- The broad based opinion of the economy
- The information and views each economist has were great
- The interplay
- The opinion and practical recommendations
- The panel itself
- The reason for what has happened & possible outcomes to the future. They were optimistic on the long run and warned about the volatility in the short term.
- These guys are great – please bring them back (2)
- Thought provoking – stimulating
- Three different viewpoints allows us to take the common ground approach
- Three extremely bright and well-spoken economists
- It was a good update to the markets, with differentiating views
- Timely economic & market info
- Tips to tell clients based on their views of economy
- Trends for future
- Update market analysis and direction provided for advisor use
- Various inputs on economy & financial markets
- Various outlooks
- Very good (2)
- Very good overall – please have next year
- Very good slides
- Very informative & entertaining
- Very informative, very entertaining
- Very relevant information
- Was a break necessary?
- Wonderful
- Yes – great

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

- 3-4 questions that may not be brought up in end – ie not healthcare bill
- A little more time for discussion
- Add a female – suggest: Quincy Krosby, PHD Economist, now with Prudential. I heard her at a conference in Las Vegas – outstanding
- Add an economist not affiliated with a mutual fund; if not, then consider adding a Leuthold economist
- Add Ron Florence from Wells Fargo
- Ask a series of questions & have them debate as if they were on TV – give no notice as to what questions will be asked
- Best part of the conference
- Compare their forecasts from 1 year ago vs. what actually occurred during the ensuing year
- Could make it even longer if you could! This was/always is the best “meat” of the symposium
- Could not open some attachments in email (presentations)
- David Kelly could speak a little slower to accommodate his accent. Golod & Webman were also excellent.
- David Kelly needs to abide by rules
- Double screen
- Get an economist from the Fed or somewhere other than a fund company
- Give them another 30 minutes
- Give them more time and possibly a chance to discuss
- Guarantee(s) ha!
- Have one independent economist that isn't getting paid by a financial firm – replace Golod or replace with American Fds Economist
- Have them recap their summaries from previous year – how did they do?
- I believe they could use another 15 minutes each
- I like the extra 30 minutes – time well spent
- I really don't have any – I thought they were all outstanding
- It would be helpful to discuss more investment implications from the economic outlook
- Keep it exactly the way it is.
- Like all speakers but would like to see the MN Fed Reserve back again
- More of the same
- More time
- More time & detail needed
- More time for topic. Give each economist a different topic/subject.
- Need to gauge their time better
- Not just 3 presentations – have an interactive discussion – throw out questions & get 3 answers
- Nothing to improve – excellent as always. Just bring them back. Actually, one thing, Jerry needs to get closer to the microphone. He was hard to hear at times.
- Nothing!
- Nothing, it's great!
- One of the best sessions
- Perfect
- Perfect as-is
- Put Webman 1<sup>st</sup> next time
- Rick Golod – should tighten presentation, but I appreciate the specific direction & the access to his model portfolio. Great materials
- Seems like more time could be allotted to such a challenging subject
- Staying more in line with the slides, less editorial
- Try to keep them coming back
- Would be better earlier to conference/day

## Betty Garvey – Basic Estate Planning

| Rating 3.61 out of 4.0                            | 4  | 3  | 2 | 1 |
|---|--|----|---|---|
| <b>Wednesday • 57 evaluations</b>                 |  |    |   |   |
| Program content 3.566                             | 32   | 19 | 2 | 0 |
| Presentation 3.547                                | 32   | 18 | 3 | 0 |
| Learning objectives met?                          | 34   | 17 | 2 | 0 |
| Materials accurate?                               | 34   | 17 | 2 | 0 |
| Handouts/av satisfactory?                         | 28   | 18 | 5 | 0 |
| Effective presenter? 3.731                        | 38   | 14 | 0 | 0 |
| Appropriate time allocated?                       | 34   | 16 | 3 | 0 |
| Facilities/tech equip appropriate?                | 29   | 17 | 4 | 0 |
| Presentation was:                                 | Basic: 36 Intermediate: 12 Advanced: 2   |    |   |   |
| How often would you like to hear Betty speak?     | Next Year: 24 Every Few Years: 21 Once is Enough: 5  |    |   |   |
| How often would you like an update on this topic? | Next Year: 25 Every Few Years: 21 Once is Enough: 3  |    |   |   |
| Wants additional information:                     | Colleen Hartmon Bollom, Leo Carton, Robert Cowin, Lynn Daly, Linda Harmon, Cindy Jones, Nicholas Kruell, Brenda Lowe, Jim Patineau, Thomas Ratelle, John Rehl, Lauri Salverda, Anthony Shostak, Kent Sorenson, Rosemary Ward |    |   |   |

### 1) What did you like most about Ms. Garvey's presentation?

- Easy to understand
- Good information to use on a daily basis
- Her very conversational and practical presentation style
- The presentation as a whole was very informative and well presented
- Very good!
- Overall good information and presentation
- Good job
- It was great! ☺
- All very practical info – we run into these situations frequently, so appreciate a basic understanding of caution situations
- How assets transfer at death
- Easy to understand yet detailed
- Used Humor
- Hit all the important points
- Simple and straightforward
- Knowledgeable and enjoyable
- Very basic but also very informative
- Good, sound info
- Good presentation, 3 take-aways of value
- Good breakdown of the info
- She was a great presenter but info was basic for me. Nothing against Betty.
- Good!
- Ms. Garvey is very knowledgeable and her presentation was full of useful info.
- Disclaimer wills
- Knows the topic described by course – gave real examples to common issues, gave time for questions.
- Well organized
- Knowledgeable, sounds reliable and likeable
- Clearly explained
- Practical, relative to client base
- Very informative and clear
- Not new info but nice recap

### 2) What suggestions do you have on how Ms. Garvey could improve her presentation?

- Use more real client examples
- I think maybe add more real life examples to make the material a little easier to digest. I think she did a great job though.
- Less tax, more techniques

## Keith Loveland – Code of Ethics

| Rating 3.68 out of 4.0                                   |  | 4   | 3  | 2 | 1 |
|--|--|-----|----|---|---|
| <b>Wednesday • 150 evaluations</b>                       |  |     |    |   |   |
| Program content  | 3.628  | 95  | 51 | 2 | 0 |
| Presentation   | 3.650  | 94  | 43 | 3 | 0 |
| Learning objectives met?                                 |  | 90  | 49 | 4 | 1 |
| Materials accurate?                                      |  | 91  | 46 | 6 | 0 |
| Handouts/av satisfactory?                                |  | 87  | 53 | 4 | 0 |
| Effective presenter?                                     | 3.759  | 112 | 31 | 2 | 0 |
| Appropriate time allocated?                              |  | 88  | 51 | 3 | 0 |
| Facilities/tech equip appropriate?                       |  | 91  | 48 | 3 | 0 |
| Presentation was:  | Basic: 14 Intermediate: 84 Advanced: 37  |     |    |   |   |
| How often would you like to have an ethics presentation? | Next Year: 93 Every Few Years: 33 Once is Enough: 6  |     |    |   |   |
| Wants additional information:                            | Dana Basballe, John Bergstrom, Gerald Brennan, O. Brown, Kathy Chen, Dan Corey, David Daline, Kathleen Elbert, Kris Fitzer, Don Fulton, CarlaAnn Goedtke, James Goedtke, Paul Greengo, Kurt Gunderson, Daryl Johnson, Kenneth Kramer, John Lawien, John Layton, Paul Light, Peter Ludwig, Gary Oliver, Mark Pehrson, Andrew Tate |     |    |   |   |

### 1) What did you like most about the presentation?

- Timely topic
- Great humor and examples
- Examples
- Very engaging
- Fundamental topics we should all know/follow
- Great job!!
- Dry material made fun and easy to learn from
- Very easy to follow and understand
- Good discussion; good speaker
- Keith is fantastic!
- Keith always does a good job. He can take a dry subject and make it interesting.
- Presenting a “boring” topic with humor
- Entertaining, enjoyable, enlightening
- Discussions related to scenarios
- Keith paced his presentation for maximum comprehension – he didn’t rush it.
- Practical nature of case studies
- Work problems (and solutions)
- Good overview and reminders!
- Clear; great examples
- Group discussions
- Case studies (3)
- Excellent review
- Keith make the session entertaining
- Keith is very down to earth when explaining the definitions for the code. His examples are great and he keeps things interesting. The case studies led to a very good discussion.
- Like the case studies; discussion much better than being talked at
- Keith makes this enjoyable!
- Good communicator – thanks for doing this!
- Humor (2)
- The presenter – bring him back for ethics portion every year!
- Good format
- Getting it done – Keith does a great job; love the humor!
- Great!
- Mr. Loveland used humor to drive the topics home
- Extremely knowledgeable; great job!
- Good speaker; reasonably good sense of humor
- Keith made it fun
- Unique teaching style

- Keith does a good job of making a sometimes agonizing topic palatable
- Keith is awesome
- Excellent program format
- Although incomplete (materials not covered), the idea of practical application was a great concept
- Nice to have information back in front of us
- Break out groups
- Good examples
- I like the case studies; gets everyone involved and thinking through the rules and principles
- Great case studies
- Mr. Loveland makes a dry subject interesting
- Stories were helpful
- Method of delivery, presentation and degree of detail
- New rules covered
- Entire course; application of issues
- Keith is entertaining and makes his points

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

- Not a fan of the “group exercise” – takes too much time
- Case studies of actual litigation/lawsuits
- Answer to case studies were not clear
- Would make a good compliance/risk presenter
- Most of us are planners vs. brokers. Examples/cases seem more like brokerage clients.
- Not much substance; but entertaining
- Time flus
- Don't do table discussion; just jump into cases so all could be covered
- Keep it up – great resource to the FPA
- Wish more in-depth when comes to fiduciary responsibilities when comes to difference of financial planning clients and non-financial planning clients
- Cases did not seem realistic
- Do it in the evening so we can get it, but still attend the other breakout sessions or do it twice in the two days we we have a choice
- Cut time allotted to work in groups to about half
- More variation in six cases discussed; only got thru 3 of 6 cases studied, so missed some learning points

**Jeremy Oliver – Developing Your Financial Planning Practice**

| <b>Rating 3.06 out of 4.0</b>                     | 4   | 3  | 2 | 1 |
|---|---|----|---|---|
| <b>Wednesday • 17 evaluations</b>                 |   |    |   |   |
| Program content 3.000                             | 3   | 11 | 3 | 0 |
| Presentation 3.000                                | 3   | 11 | 3 | 0 |
| Learning objectives met?                          | 4   | 10 | 3 | 0 |
| Materials accurate?                               | 4   | 10 | 3 | 0 |
| Handouts/av satisfactory?                         | 4   | 9  | 4 | 0 |
| Effective presenter? 3.177                        | 4   | 12 | 1 | 0 |
| Appropriate time allocated?                       | 4   | 11 | 2 | 0 |
| Facilities/tech equip appropriate?                | 5   | 11 | 0 | 0 |
| Presentation was:                                 | Basic: 12 Intermediate: 3 Advanced: 0             |    |   |   |
| How often would you like to hear Jeremy speak?    | Next Year: 2 Every Few Years: 8 Once is Enough: 5 |    |   |   |
| How often would you like an update on this topic? | Next Year: 2 Every Few Years: 6 Once is Enough: 6 |    |   |   |
| Wants additional information:                     | Lucas Bucl, Curtis Brock                          |    |   |   |

1) What did you like most about the presentation?

- Real life examples
- Good information, presented well
- Variety of information that Jeremy covered

- Charming, very humble
- This was an excellent presentation for those considering starting a practice.
- Good reminders for those who already have a practice.

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

- Ask up front what we want to get out of the presentation
- More time and more depth would have been good
- Use “um” and “alright” less in presentation
- Try not to read the slides
- Speak away from the computer
- He told me he had never presented like this before and was very nervous – bless his heart.

### Louis Stanasolovich – Using Interns for Success

| Rating 3.47 out of 4.0                            | 4  | 3 | 2 | 1 |
|---|--|---|---|---|
| <i>Wednesday • 22 evaluations</i>                 |  |   |   |   |
| Program content 3.947                             | 13   | 6 | 0 | 0 |
| Presentation 3.958                                | 10   | 6 | 3 | 0 |
| Learning objectives met?                          | 10   | 4 | 4 | 0 |
| Materials accurate?                               | 14   | 5 | 0 | 0 |
| Handouts/av satisfactory?                         | 15   | 4 | 0 | 0 |
| Effective presenter? 3.976                        | 9  | 8 | 2 | 0 |
| Appropriate time allocated?                       | 6  | 6 | 3 | 1 |
| Facilities/tech equip appropriate?                | 10   | 6 | 2 | 0 |
| Presentation was:                                 | Basic: 2 Intermediate: 9 Advanced: 6                                   |   |   |   |
| How often would you like to hear Lou speak?       | Next Year: 5 Every Few Years: 9 Once is Enough: 3                      |   |   |   |
| How often would you like an update on this topic? | Next Year: 5 Every Few Years: 8 Once is Enough: 3                      |   |   |   |
| Wants additional information:                     | Johannes Fure, Jason Plank, Kent Schutte, Scott Simpson, Rosemary Ward |   |   |   |

1) What did you like most about the presentation?

- Line by line skills for different levels – very thorough!
- It was all great information
- Very detailed
- Classification info
- Top flight FP and IM businesses grounded on using interns on an hourly compensation model.
- Thank you for sharing so many of your actual processes and tools
- Great material, tactical tools to implement
- “okay” must go, used too much
- content was valuable
- His entire program is very impressive, organized, and very well thought out.
- His studied delivery was sobering.
- The statistics

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

- You could have used more time. I have a one person practice, if you could keep smaller practices in mind when forming presentation.
- Don't use baseball analogy
- Recommend several speakers on subject representing different F.P. practice business models ie sales focus (fee and transaction). Hourly vs. credit for students. Also local to Minnesota trends and use of interns.
- Almost too casual in presentation verbiage and physical
- Have you written a book on building your practice with Internships?

## Louis Stanasolovich – Creating Lower Volatility Portfolios

| Rating 2.62 out of 4.0                            | 4   | 3   | 2  | 1  |
|---|---|-----|----|----|
| <b>Wednesday • 297 evaluations</b>                |   |     |    |    |
| Program content 2.759                             | 62  | 115 | 73 | 28 |
| Presentation 2.478                                | 37  | 107 | 86 | 48 |
| Learning objectives met?                          | 44  | 83  | 79 | 53 |
| Materials accurate?                               | 66  | 109 | 54 | 18 |
| Handouts/av satisfactory?                         | 34  | 69  | 91 | 61 |
| Effective presenter? 2.625                        | 57  | 97  | 85 | 38 |
| Appropriate time allocated?                       | 34  | 86  | 97 | 49 |
| Facilities/tech equip appropriate?                | 68  | 139 | 44 | 20 |
| Presentation was:                                 | Basic: 7 Intermediate: 84 Advanced: 137   |     |    |    |
| How often would you like to hear Lou speak?       | Next Year: 43 Every Few Years: 100 Once is Enough: 113  |     |    |    |
| How often would you like an update on this topic? | Next Year: 92 Every Few Years: 87 Once is Enough: 64  |     |    |    |
| Wants additional information:                     | Terance Amundson, Douglas Barinsky, Dana Basballe, Paul Basballe, John Bergstrom, Paul Block, Colleen Hartmon Bollom, Curtis Brock, Steven Bullert, Leo Carton, Dan Corey, Lynn Daly, Larry DeGraaf, Stephen Fischer, Don Fulton, CarlaAnn Goedtke, Gordy Graham, Anthony Hallada, Jason Hallonquist, Keith Hein, Louisa Hext, James Householder Jr, Christina Hughes, Nadia Keric, Nicholas Kruell, Douglas Last, Rick Lueck, Sean McDermott, Brian McKnight, Timothy Munkeby, Matthew Nelson, Richard O'Connor, Gary Oliver, Anthony Parr, Mark Pehrson, Thomas Ratelle, Mark Rekow, Ronald Rydell, Lauri Salverda, John Schwalbach, Scott Simpson, Paul Stein, Fredrick Sundquist, Joe Swanson, Andrew Tufford, Cynthia Turkington, Mark Veurink, Nate Wenner, Teresa Wernecke |     |    |    |

### 1) What did you like most about the presentation?

- A different look at investing, thought-provoking
- A lot of info and detail
- Access to PowerPoint – used for analysis
- All the charts, graphs and stats (7)
- Challenged my thinking on asset allocation
- Charts appeared interesting, however, too many
- Cool data presentation – good info
- Difficult to follow – unable to see screen and materials. Did not follow his slides.
- Enthusiasm of speaker
- Excited about his work; like his newsletter
- Good data
- Good data, but overall points were not really clear other than promoting a lower volatility portfolio
- Good data; very knowledgeable in general
- Good info, but too much
- Good information, just didn't like one chart after another
- Good initial info on where economy sits today compared to historical numbers
- Good materials, illustrations, strong knowledge base
- Good overview of his view of investment markets
- Good presenter
- Good topic; enjoyed what I could hear. However, did not seem to make a point for a take-away.
- Good, but too long
- Great data
- Great info – maybe too much, however, over redundant
- Great info, lots of slides
- Great information
- Great presentation on importance of using managed futures and other alternatives in portfolios
- He had a ton of great information about many aspects of the economy
- He obviously knows his stuff – great info – hard to watch for two hours
- He said he was going to tell us how to create a lower volatility portfolio, but he didn't really. His presentation as a whole is a very good classic sales presentation that "disturbs" the audience and then offers a solution: his newsletter by subscription.
- He was too much of a repeater – too many slides. The meat of his presentation was rushed at the end.

- He's someone to listen to. His research model is very good.
- His explanations of how economic factors: 1) played out in investing historically; 2) should drive your investing decisions going forward – great insight!
- I will need to study the slides in detail and be able to assess the session. I am overwhelmed by the number of slides and amount of information.
- I'm checked out
- Information was good, but presentation was disorganized
- Insights – but would have been better earlier in the day due to complexity.
- Interesting and widely varied information
- Interesting information (2)
- Interesting, but too long!
- It was terrible
- Knowledgeable (2)
- Knows his material
- Little
- Long on economic fact, short on building portfolio as suggested
- Lots of data; interesting historical comparisons
- Lots of info (2)
- Love the material
- Loved the data; loved the explanation "this is what you need to take away from this"
- Made me think – although feeling like a "deer in the headlights"
- Market info
- More time spent on the last 25% of presentation
- New figures – looking at the data; no discussion on creating lower volatility portfolios
- New ideas and thoughts on the economy
- Non-correlation slides
- Not a lot to be honest...
- Not much (2)
- Nothing (3)
- Presentation quite long, lots of charts...
- Presenter knowledgeable, but boring
- Relationship between stocks and commodities; what investments will do in what environment. Speaker may know a lot and have passion, but presentation is disjointed.
- Relevance to subject matter/title? Massive information, but did we conclude?
- Smart guy
- Some of his slides were interesting, but way too many; total overkill – what was his point?
- Some of the economic/economy info was interesting
- Some of the statistics and charts were valuable; interesting on lack of diversity of mutual funds with S&P 500
- Sorry – didn't like it
- The end (2)
- The reviews on this presentation will be brutal, but this by far is the most informative speech, great information, great concepts; the advisors that indicate this was too much don't understand long-term investing and now correlation has changed significantly.
- The slides I can download
- The topic
- The touchy-feely aspect
- This is the best feedback I could pull out of the presentation – A ton of good information and thought provoking statements; no shortage of graphs and facts
- Too many slides and data; talk more about what it means to us
- Too many slides; unable to see them; not sure what the whole point was.
- Topic was good; approach was poor. Good to have "technical" content in the program.
- Valuable data
- Variety of info
- Very difficult to follow the charts on screen. Two hours of economic data – important, but hard to follow
- Very good
- Very informative (2)
- Very knowledgeable (4)
- Very knowledgeable about historic perspective
- Very knowledgeable about the economy and data presented
- Very knowledgeable on the topic, good economic info, connected a variety of economic indicators to managing portfolios
- Way too detailed info with no transition to practical applications
- Well done, thank you

- When it was over! (2)
- Willingness to share how he does things
- Wow – lots of numbers

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

- A few of the slides could be selected to be printed; half way back the slides were not legible. He did not deserve 2 hours on the program.
- A little long without a break
- A little too long
- A lot of data presented, but not much on actually creating lower volatility portfolios
- Absolute waste of time without handouts or ability to read the slides! He said it best “this was like watching paint dry.”
- Adhere to published time slot
- Be more focused; don’t try to show so much
- Better AV materials; bigger screen based on room size. Remember your topic – start there.
- Binoculars needed; how do you get out of the doom and gloom – gold, commodities, ETF momentum, managed futures!
- Can’t see massive numbers of charts depending on where seated. Why have all the slides and flip thru them so fast, some not using at all??
- Charts too difficult to see
- Choose fewer charts – make your point – provide more actual market direction based on information – wanted more conclusions
- Could not relate to all the info; maybe too advanced. Too much time explaining charts; just tell us what it means.
- Could pare down even more
- Couldn’t read slides. If you present from stage, slides have to be visible to all attendees.
- Couldn’t read slides. Include in handouts for more effective presentation. Understand why not printed, but presentation was “lost” on me since I couldn’t read anything. Say “ok” less.
- Cover topic advertised
- Create a presentation tailored to the time frame so he doesn’t have to rush through much of it. Too many charts. Not a lot of talk about creating a lower volatility portfolio until the end.
- Cut down on the technical slides and discuss more portfolio management strategies
- Data overload; needs to outline objective of talk before start
- Did not follow the overview in my notebook
- Didn’t get to a point; lots of info, but...
- Difficult to sit through; hundreds of charts none of us could see. Make it more concise and legible and to the point.
- Don’t bring back unless can cut length/content down and have “thesis” statement
- Don’t focus on selling newsletter/portfolios. Too many slides and numbers. Get to the point! Didn’t spend much time discussing the topic; he just showed slides until the last few minutes.
- Far too many slides; far too many comments and historical comps; far too few definitive comments (explanations of the relevance)
- Far too much info; shorten to talk about those asset classes that provide real diversification and explain why
- Fewer graphs; not sure why we didn’t take the scheduled break
- Fewer slides and more general themes
- Fewer slides; larger slides; speak to the group, not at the group. No interaction. Talked down to audience. Slow down.
- Focus on less information, more knowledge and understanding
- Follow the topic of the presentation rather than spending the whole time going through economic data; wasn’t as advertised (until the very end); talk about how they had lower volatility
- Getting to the point – what to own in this volatile market
- Give less material with more explanation
- Give us a thesis up front, narrow down the slides. Focus more on why your strategy is better and how it adds value. It rambled way too much. There was no real discussion about how to create portfolios.
- Give us some key charts; need bigger screen, tough to see small print
- Got much better toward the end. Thank you.
- Great info – hard to see from middle of room. It would be very helpful to have handouts in our books. Less slides with more abbreviated analysis – too many slides.
- Handouts for people in the back. Could not see most slide info. Hard to track his thoughts when you do not have a visual to look at. Do this earlier in day.
- Have a point spelled out; get to it sooner. Fewer slides. Have an outline. Create bullets and back up with charts, not just all charts.
- He was slow on getting to the point; longer time

- He's in love with statistics, but this leads him to take an eternity to make his point. He throws up a slide, explains what it shows, move to next – easy to lose point.
- His opinions on direction; fewer slides
- History of the markets and economic data was unnecessary and added 30-45 minutes – 1 hour plus
- How do we apply these portfolios to our client situations?
- I could not see the forest through the trees (too many slides)
- I didn't even catch the "how" to do this
- I do not know what the objective of the presentation was supposed to be. I kept waiting for "creating lower volatility portfolios" – too many slides – too broad of presentation
- It took him 90 minutes to get to his point
- It was frustrating that the official topic wasn't addressed until 1 ½ hours after the presentation started. Good economic info, but it limited time for topic at hand and no real instruction of portfolio designs – just endless charts.
- Less chart-reading and more relevant topic points!
- Less information, but go more in depth
- Less technical
- Limit the slides and content. Way too much information presented in such a short time period. Needs better flow. I thought the topic was lowering volatility...
- Long and boring. Get to the point. Make a recommendation. Couldn't see the charts. Way too much data.
- Lots of data – need to synthesize better. What points/themes trying to communicate?
- Lou, you say ok at the end of many sentences. Need some color on charts.
- Louis tended to read from his slides too much. He also had too many slides with information too small to read. Seemed disorganized with his thoughts. Too many "okays." I'm sorry, but this was a painful presentation to sit through. Please do not have him present at any future symposiums.
- Make data visible on screen
- Make slides that can be seen and read. No handouts. No explanation of objectives. Constantly digressing.
- Make the connection between the economic statistics and what to actually do with the information. How did you build the portfolios?
- Message is lost with too much data. Showing many charts, not making any points. He lost me at hello. Nick Murray would not like this presentation. No stories.
- More graphs – I couldn't follow very well
- More slowly presented material
- Need a break – visuals too small
- Need intros, summary, and breaks when dealing with lots of data
- Need the handouts for the charts – pass out a few charts that are most crucial to the main point
- Needs to improve his presentation skills
- Needs to summarize more often; very knowledgeable, but rambling
- Never mentioned "lower volatility" until ten minutes were left; sounded like a pitch to sell his newsletter
- None at this time
- Not sure what to do with his info
- Organize information into themes before covering data. Prioritize data to reduce volume of slides. Could cover a few key slides in detail and have a slide that lists other slides/data available online that further illustrates the theme.
- Ouch! One hour would be enough.
- Outline? Purpose of historical relevance; goal of portfolio design
- Overkill on presentation materials; inaccurate statements. The 3 economists tomorrow will show charts and graphs and theirs will be helpful to us. Reminds me of Suze Orman – gives me part of the story and over-sensationalizes
- Overwhelmed with slides – I'd appreciate more summary of meaning versus so many tables
- Overwhelming
- Overwhelming amount of info. I still don't have any better idea of how to build a less volatile portfolio, outside of adding some commodities and real estate
- Pick 125 slides!
- Please do not show as many graphs as you used today
- Presentation too long without a break
- Really wish handouts were available as couldn't see squat on many slides
- Recap of slides was tiresome – summary would have worked and agenda items would have been communicated better
- Reduce number of charts to key factors – excessive number of charts which weren't readable from most seats. We all don't need the full history lesson.
- Roll together data a little better; maybe too much information and not enough conclusions
- Select a few key topics that are current and use fewer slides to expand on what it means going forward. Show sample of low volatile portfolios that can be seen on the screen.

- Should be summarized with handouts and consolidated better PowerPoint; maybe a break, too long for end of day speaker
- Should have had charts in notebook
- Should have provided a copy of the charts in the handouts
- Slides impossible to read from middle of room. Shorten length or give break. Don't state the blatantly obvious – preaching to the choir.
- Slides were very good, but way too small detail for us to see much during speech; very good to have them later at least via download
- Slow down
- Slow progress, too many slides/charts – clean it up, simplify
- Somewhat disjointed. Would just start to touch on a key point on a graph, then before completing, switch to another graph. Too much data. I often couldn't see the numbers on the slides and I was in the middle of the room.
- Speak to the announced topic; vast amount of data – conclusions?
- Stand on the lighted stage instead of standing ground level in the dark. Less charts with greater/deeper explanation.
- State what it is you want us to understand
- Summarize – too many charts lost in data/graphs vs. understanding
- Support your rationale with charts
- Take a break, good for the audience and for the speaker
- Tangible take-aways; bigger font on slides
- The information was interesting, but not real easy to use in my world. The presentation didn't really follow the title. This was more about stats than anything about how to create lower volatility portfolios. Too much pushing his product.
- The PowerPoint slides were hard to see and read, but in a room like this with this many people, that's understandable
- The slide presentation was mind-numbing!
- The voluminous info to what could happen
- This was grueling. Slide after slide of data and stats without a consistent theme/thesis. So what does this mean for me and my clients? Impress me with your charts? Application?
- Too hard to read slides – should provide at least some of them to attendees. Hard to follow. Info not all tied together to say how to create lower volatility.
- Too long; too complex; need a break
- Too long; too technical; not enough take-aways for practitioners
- Too many charts – not enough explanation around actual diversification strategies
- Too many charts and graphs that were too hard to follow; get to the point and offer solutions
- Too many charts that basically prove same thing, lose 50%. Stop saying “ok?” so frequently.
- Too many charts with too much information. Very difficult to read. Almost better to talk through concepts with more simplified graphs and charts.
- Too many charts! Instead of focusing on a few in detail, he skimmed over several charts without getting into the details.
- Too many charts. Too many numbers and graphs. Add more stories.
- Too many charts/graphs. Not enough time for “lower volatility portfolios”
- Too many dull, too small font charts. Too many black and white PowerPoint slides. Develop a few cogent summary slides. Death by PowerPoint!
- Too many graphs; it gets really long
- Too many numbers without the handouts
- Too many slides/numbers (6)
- Too many slides. Could not follow along technical information as presented. Presenter is knowledgeable, but needs to consolidate slides. Use more summaries of findings, draw conclusions! Use bullet point summaries.
- Too many slides; felt redundant
- Too many slides; info overload; slow down
- Too many slides; unable to see them. He did not meet class objective; complete waste of time. Some good points made, but overall very poor presentation. No take-aways; can't possibly recall info presented.
- Too many stats – condense and summarize. Tell us what to do with the data.
- Too much “data” of past for too long; charts were distracting from discussion points
- Too much data
- Too much data – too advanced. He should tell us why this information is important and what to do with it!
- Too much data without much interpretation or application to planning; no solutions to all of the negative news.
- Too much data. Keep it more conceptual and thematic
- Too much detail! He should be on first thing in the morning rather than late in the day.
- Too much info on graphs. I was hoping to get ideas on “creating a low volatility portfolio.”
- Too much info! What does it all mean? Slide numbers not readable from front row.

- Too much information is a dangerous thing. He might pay more attention to the forest so as not to lose us among the trees.
- Too much information to digest for the time; have a break or 2 one-hour sessions
- Too much information, overwhelming
- Too much information. Spent too long talking about markets and not enough on actually building portfolios.
- Too much time on graphs
- Too much, too fast, too small print (just told we could have printed it out)
- Took 1:40 to get to how to create lower volatility portfolios. Too much information.
- Two hours at the end of the day was a bit long
- Two hours is too long. Pick 20 slides and dig deeper. He was a mile wide and an inch deep.
- Two hours straight got a little long
- Use less slides
- Very hard to follow without handouts. You cannot force that many slides into this time period. Dry for last presentation; flip and upbeat or practice management with end slot.
- Very, very dry – not the best program for an afternoon; l-o-o-o-ng program
- Way too many charts – talk to me! Relate to today – what is your point.
- Way too many charts. We got the point much sooner!
- Way too much chart discussion. Should focus on less charts (more focused) and talk about the session objective of “creating lower volatility portfolios.” More tactical/practical on what to do about the info.
- Way too much content
- Way too much data and question the analysis
- Way too much detail on way too many slides. Difficult to follow.
- Way too much information in a short period of time to draw any conclusions
- Way too much information. Didn’t have to show everything that has an impact. Took too long to make a point.
- What are the solutions to all of the issues/problems presented?
- What was subject – in fact investment analysis should have been available for CE
- When a break is scheduled, take it. It has been a long day.
- Where did you find this guy? This was painful.
- Where were the HOs? They are needed to put notes on and to remember. Telling us there are 250 we can download is unacceptable. Should pick small number of overheads for slides and pass them out so we can take notes on them and track better.
- While it was a very detailed history of a wide variety of markets, it did not specifically address the presentation title about creating portfolios. Oops – finally touched on it at the very end.
- Why slides with very small numbers and words when all attendees were to attend therefore in large room and over half would not be able to read the slides
- Worst presenter in all my years at FPA! Talked over an hour without making a point. Why so many charts to make the point? Many disagreed with him.
- Would have liked to print out or receive handout; tough to see slides
- Wow – so much detail, fact, figures, charts – I was lost!

## Jack Surgent – Newest Tax Update Issues and Planning

| Rating 3.84 out of 4.0                            | 4  | 3  | 2  | 1 |
|---|--|----|----|---|
| <b>Thursday • 349 evaluations</b>                 |  |    |    |   |
| Program content 3.805                             | 285  | 60 | 4  | 0 |
| Presentation 3.791                                | 279  | 59 | 5  | 1 |
| Learning objectives met?                          | 279  | 59 | 5  | 1 |
| Materials accurate?                               | 296  | 42 | 3  | 0 |
| Handouts/av satisfactory?                         | 254  | 72 | 10 | 0 |
| Effective presenter? 3.913                        | 308  | 21 | 1  | 2 |
| Appropriate time allocated?                       | 267  | 68 | 7  | 1 |
| Facilities/tech equip appropriate?                | 230  | 82 | 12 | 1 |
| Presentation was:                                 | Basic: 16 Intermediate: 137 Advanced: 173            |    |    |   |
| How often would you like to hear Jack speak?      | Next Year: 286 Every Few Years: 48 Once is Enough: 2 |    |    |   |
| How often would you like an update on this topic? | Next Year: 300 Every Few Years: 29 Once is Enough: 1 |    |    |   |

|                                      |   |
|--------------------------------------|---|
| <p>Wants additional information:</p> | <p>Terance Amundson, Charles Anderson, Sandra Anderson, Robert Aylin, Chad Babcock, Dana Basballe, Paul Basballe, John Bergstrom, Lora Bettendorf, Michael Bishop, Robert Bjork, Paul Block, Charles Blossom, Stephen Bowman, Gerald Brennan, Curtis Brock, O. Brown, Lucas Bucl, Steven Bullert, Alexander Bush, Sharon Calhoun, Barclay Carriar, Ryan Carruth, Leo Carton, Kathy Chen, David Clausen, Dan Corey, Robert Cowin, David Daline, Lynn Daly, Sarah Darr, Bonnie Denzel, John Dritz, Ford Droegemueller, Mark Edlund, Kathleen Elbert, Steven Finkelstein, Larry Flanagan, Jill Floden, Georgette Frazer, Don Fulton, Brenda Gempler, Dennis Gianoli, CarlaAnn Goedtke, James Goedtke, Joseph Grochowski, Kurt Gunderson, Jason Hallonquist, William Hansen, Scot Hanson, Linda Harmon, Anita Hawks, Lynn Hedrick, Keith Hein, Kevin Hermening, Michael Hess, Steven Hess, Louisa Hext, John Hinz, James Householder, Jonathan Jaranson, Timothy Jenneke, Joel Johnson, Thomas Jones, Karin Jordahl, Sharon Jordahl, Nadia Keric, Michael Kobs, Rebecca Krieger, Nicholas Kruell, Gregorie Kvilhaug, Gary Lage, Douglas Last, Michael Lauer, John Lawien, Robert Lawson, Steven Lear, Brad Leivermann, Eric Lind, Brenda Lowe, Peter Ludwig, Jerry Lund, Sean McDermott, Jon Melander, Thomas Menzel, Kristi Mertens, Joseph Miller, C. Buzz Moen, Eric Moleski, Brent Mueller, Timothy Munkeby, Daniel Myers, Matthew Nelson, Lisa Nesser, John Oberg, Scott Oeth, James OHalloran, Steve Olsonoski, Anthony Parr, Mark Pehrson, Dana Pollard, Thomas Ratelle, Mark Rekow, Peter Rekstad, Timothy Riley, Reed Rinderknecht, Joan Rossi, Linda Roszak, Lauri Salverda, James Sanders, Jeremy Schmidt, Kent Schutte, John Schwalbach, Tenielle Shallman, Anthony Shostak, Scott Simpson, Greg Snider, Kent Sorenson, Fred Sowatzka, Clayton St. George, Katherine Stienessen, Fredrick Sundquist, Andrew Tate, Dean Tesch, David Thesing, Jeffrey Thorup, Cynthia Turkington, Ronald Wall, Rosemary Ward, Nate Wenner, Teresa Wernecke, Damian Winther, Jean Wolfe</p> |
|--------------------------------------|---|

### 1) What did you like most about the presentation?

- All of it
- Always good – bring back in a couple of years
- Always great (2)
- Always great – tactical approach to clients. Great ideas
- Always has great insights & planning ideas – appreciate the focus on Roth conv – answered my questions
- Always interesting
- Always timely, good info. Bring back next year again
- Always very good
- Always very helpful
- An obvious expert – clear/concise
- Animation overhead
- Application – tangible ideas
- Awesome
- Book him every year
- Brisk paced, clear presentation
- Clarity – linear
- Clear concise great teaching; thank you for great written materials
- Comes up with good planning ideas
- Content
- Covered a lot of ground
- Covered a lot of timely material in an effective & organized way
- Creative tax and legal planning ideas
- Details – clear explanations – planning applications – handouts – enthusiasm
- Details and how the tax changes apply to the client and actual examples
- Discussion of Roth conversions in 2010
- Dynamic, energizing speaker. The way he condenses information so it really sticks in our mind. Synthesizes complex info.
- Effective presentations on what can be day material
- Ending mid-sentence with a question is distracting, but he did manage to keep our attention
- Energetic speaker – conveys message in understanding way
- Energy & easy to follow

- Engaging & relevant
- Everything (2)
- Examples & ideas & newest tax update issues planning handout
- Examples & taking questions
- Excellent (4)
- Excellent planning ideas – I need this every year
- Excellent presenter
- Excellent timing good on topic
- Fast pace, applicable strategies
- Focus on Roth IRA was very timely
- Good planning ideas
- Great (4)
- Great – please keep Jack coming back every year
- Great energy (2)
- Great ideas
- Great ideas for converting traditional IRA to Roth IRA
- Great info – relevant
- Great info – very deep on technical knowledge
- Great info, especially Roth IRA planning
- Great information – a lot of detail
- Great job!
- Great outline – very detailed. Explains planning concepts clearly
- Great presenter, but material too basic – ie recharacterization item has been implementable for years – old news
- Great session
- Great speaker & info
- Great stuff
- Great tax info
- Great tax planning ideas – impressive energy level
- Great updates, facts and strategies for us to put to practical use. Thank you Jack & FPA
- Handouts are a great resource to review and catch-up on tax planning matters
- He did a good job of explaining Roth IRA conversions
- His knowledge & planning strategies
- His presentation style
- His strong knowledge base on the tax system and share with us his experience
- His updates and ideas on taxes
- I always learn something new
- I like how he used the overhead projector
- I like the way he shows tax planning ideas & strategy
- I thought the information presented was great. For something that changes as frequently as tax laws (and tax planning), this presentation was invaluable.
- Ideas to implement now – high energy presentation
- Intellectual capital
- IRA to a Roth IRA
- Jack always does a great job (2)
- Just overall good information – please have him back next year
- Kept moving & immediate implementable ideas
- Knowledge; Roth IRA in pieces idea
- Knowledgeable - made talking about tax sensitive planning interesting
- Level of detail
- Lots of great ideas
- Lots of ideas
- Love his enthusiasm – he is good at breaking down concepts into simple numbers
- Many good ideas
- Never short on ideas, who thinks about these things like he does??

- New laws – trend
- Nice use of overhead
- Notes in book for future reference
- One of the best presenters in tax planning
- Overall good.
- Overhead – great
- Pertinent
- Planning ideas (2)
- Planning tips – thoughts for the future
- Practical – current – clear – useful
- Practical & unable information
- Practical current planning ideas – very clearly explains concepts – nice job
- Provided several good ideas
- Reference material. Making it simple - enthusiasm.
- Relevancy of tax planning concepts (timeliness)
- Roth conversion details
- Style & content
- Super clear and relevant
- Tax strategies
- Tax topics were very current to current events
- Technical information (2)
- Thank you – need more
- Thanks – good job
- The information presented on Roth Conversions was put into an understandable format
- Timely & relevant – with us in mind
- Timely information, explained well
- Timely to environment – direct to our needs for planning, great ideas & concepts
- Timely topic (2)
- Timely/intelligent
- Unique planning ideas
- Usable ideas for multiple types of clients
- Use of real situations/numbers
- Useful – practical – great examples
- Very informative – like that he was moving forward
- Very clear examples
- Very clear speaker
- Very engaging and a wonderful speaker
- Very good
- Very good communication – clarity. Good examples – he comes off as a knowledgeable, smart but every day guy
- Very important
- Very informative
- Very informative, clearly explained
- Very knowledgeable
- Very relevant
- Very thought provoking ideas & strategies. Excellent examples – most importantly, very relevant & actionable strategies and suggestions
- Well paced

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

- Allot more time (2)
- Better handouts
- Build up takes too long; too much focus on general concepts
- Can't read the projection screen, can't follow in the book, sometimes he talks in a foreign language
- Come back

- Come back next year – make sure we hear about any IRA conversion software for Roth IRA calculations
- Concentrated too much on Roth conversions
- Do you know you say “along these lines” a lot?
- Don’t use an overhead; PowerPoint is where we are today
- Fewer topics, slow down
- Focus on taxes for independent sole prop or S-corp for planners to do their own tax planning
- Follow the outline more closely to help in note taking
- Formal charts would have been nice
- Great job, presented well
- Great presentation
- Handwriting overhead hard to read
- He always presents different than his handouts. I wish he would create handouts that follow his presentation better.
- He could have had more time I think, but the time he did have was fine. He probably could've gone on all day, but 2 hours was a long time.
- Heads up before making such a big change to presentation
- I missed the presentation last year on social security, but I heard it was good. I will like to hear about that next year.
- I think he is fantastic. It is a little distracting how he jumps around, but the notes are very valuable!
- I would love if his overhead scratching were also included in the handout material.
- It was old information on the Roth conversions and too much time was spent on it. My clients are not rich; more focus on the average person family.
- Keep doing a great job.
- Modernize the transparencies
- Need an all-day workshop, hands-on practical case study experience
- None – I love the way he ad libs, great speaker – ask him back!
- Excellent; It was great; terrific (several)
- Nothing (2), great as is
- Often repeated “along those lines.” He could improve his talk by reducing the use of this phrase. (2)
- PowerPoint for numbers and examples versus him writing it (hard to read)
- Provide this in a slower, more distinct way
- Provide worksheets for everyone to follow
- Quit asking audience to finish your sentences! Second half was much better!
- Refer to materials during the discussion
- Room too large for whiteboard presentation
- Roth conversion information seemed basic
- Skip the basics on Roth and move more to the proposals
- Thank you
- Too much on Roth IRAs (2)
- Too much time on repeat items from last year
- Too targeted toward Traditional to Roth IRA conversion and first-time homebuyers credit
- Two screens; hand written examples as handouts

## Bob Veres – The Future of Financial Planning

| Rating 3.29 out of 4.0             | 4   | 3   | 2  | 1  |
|------------------------------------|-----|-----|----|----|
| <b>Wednesday • 378 evaluations</b> |     |     |    |    |
| Program content 3.238              | 128 | 197 | 41 | 0  |
| Presentation 3.256                 | 135 | 187 | 42 | 0  |
| Learning objectives met?           | 120 | 179 | 49 | 3  |
| Materials accurate?                | 89  | 145 | 66 | 6  |
| Handouts/av satisfactory?          | 63  | 135 | 80 | 13 |
| Effective presenter? 3.366         | 179 | 144 | 29 | 9  |
| Appropriate time allocated?        | 153 | 165 | 30 | 8  |

|   |  |     |    |   |
|---|--|-----|----|---|
| Facilities/tech equip appropriate?                | 141  | 137 | 32 | 4 |
| Presentation was:                                 | Basic: 99 Intermediate: 208 Advanced: 35   |     |    |   |
| How often would you like to hear Bob speak?       | Next Year: 69 Every Few Years: 233 Once is Enough: 39  |     |    |   |
| How often would you like an update on this topic? | Next Year: 96 Every Few Years: 194 Once is Enough: 31  |     |    |   |
| Wants additional information:                     | Terance Amundson, Charles Anderson, Dana Basballe, Paul Basballe, John Bergstrom, Thomas Bird, Charles Blossom, Stephen Bowman, Gerald Brennan, Curtis Brock, Walter Broughton, Lucas Bucl, Steven Bullert, Alexander Bush, JoVayne Cappa, Barclay Carriar, Ryan Carruth, Leo Carton, Kathy Chen, James Clemensen, Dan Corey, Robert Cowin, Lynn Daly, Sarah Darr, Robert Eichten, Kathleen Elbert, Byron Ellingson, Chad Essman, Andrew Fishman, Larry Flanagan, Noelle Follen, Don Fulton, Peter Gasperlin, Brenda Gempler, Susan Gherity, CarlaAnn Goedtke, James Goedtke, Gordy Graham, Paul Greengo, Joseph Grochowski, Kurt Gunderson, Jason Hallonquist, William Hansen, Linda Harmon, Keith Hein, Robert Hengelfelt, John Hinz, Lori Hoefener, James Householder Jr, Christina Hughes, Craig Jergenson, Cindy Jones, David Jungquist, Nadia Keric, Kay Kramer, Kenneth Kramer, Nicholas Kruell, Laura Kuntz, Debra Kuper, Gregorie Kvilhaug, Gary Lage, Douglas Last, Michael Lauer, John Lawien, Robert Lawson, John Layton, Brad Leivermann, Paul Light, Brenda Lowe, Peter Ludwig, Rick Lueck, Daniel May, Brian McKnight, Thomas Menzel, Marianne Merriman, Eric Moleski, Louise Monahan, Daniel Myers, John Oberg, James O'Halloran, Steven Ohm, Gary Oliver, James Patineau, Mark Pehrson, Dana Pollard, Thomas Ratelle, John Rehl, Mark Rekow, Peter Rekstad, Michael Ricci, Tammy Robbins, Lauri Salverda, James Sanders, Jeremy Schmidt, John Schwalbach, Tenielle Shallman, Scott Simpson, Kent Sorenson, Nancy Swanson, Andrew Tate, Dean Tesch, Jeffrey Thorup, Andrew Tufford, Cynthia Turkington, Ronald Wall, Anne Ward, Rosemary Ward, Nate Wenner, Teresa Wernecke, Damian Winther, William Wixon, Lloyd Woelfle, Jean Wolfe, Amy Wolff |     |    |   |

### 1) What did you like most about the presentation?

- 30 goals (9)
- 4 D's: Discover, Dream, Design, Deliver (5)
- A couple of reminders that were good to hear – the 30 goals ideas was new!
- A few good practice management items
- Asking for conscious change – advocate for importance of advisors
- Away from technical; relationships most important
- Big picture and trends of industry
- Big picture view; ideas for change
- Blue dot (3)
- Bob is personable, thoughtful and his suggestions are rational and doable
- Bob is well known in the profession. I liked that he was at the symposium this year.
- Bob presents like a professional – always trying to find a better way to improve what we do
- Bob Veres rocks!
- Call for action
- Call to action to implement change in our practices
- Call to action; things to think about
- Casual, not pretentious – gave several good tips to actually use
- Change management process
- Clarity, well organized, helpful ideas
- Client services and practice management – great!
- Client services, practice management
- Comfortable presentation
- Common sense ideas
- Comprehensive ideas and good call to action
- Confirmation about what we do really helps
- Delegation thoughts
- Discussion regarding delegating
- Distinguishing between investing, client services, and practice management
- Easy style to listen to
- Easy to listen to – conceptual
- Encouraged audience to be passionate about their business
- Examples of what other planners are doing
- Excellent speaker
- Fiduciary marketing idea
- Focus around setting goals, for self and clients

- Focus on behavior change
- Forward looking at the industry
- Forward thinking
- Gave me ideas to improve my practice. I've made a list of goals to try to achieve.
- Good advice throughout and helpful to hear other advisors best practices
- Good blend of technical and practical material
- Good ideas
- Good message
- Good overview of new FP developments
- Good practice management at a high level
- Good presentation
- Good presentation style – voice/rhythm, etc.
- Good stories and demeanor
- Good stuff to think about and take back.
- Good use of humor
- Good, just not new
- Got me thinking about change – opened my mind to new ideas
- Got me thinking personally and professionally
- Great big picture thoughts on the business
- Had some good points on what other planners are doing
- He challenged the group to make changes to improve the financial planning profession
- He gave us 2-3 things to take back and use to change the way we look at our FP practice
- He provided me with a couple of great ideas that I will implement in my practice
- He provided several ways to have more effective client meetings and how to focus on the client's needs (goals)
- He was very engaging
- His analogies and real life examples he used in his presentation
- His perspective based on his long experience in the business
- His point on making changes in your practice – implementing new ideas
- His point on Modern Portfolio Theory
- His praise for our profession
- His presentation style and how to actually apply in practice
- His style “personal” and his affirmation of our work
- His thoughts as to what will happen in the future
- His three questions and the four steps
- His vast resource to draw from; he's a great communicator
- His views on the future; ideas to improve my practice/firm
- His vision and ability to share it in a way it relates to anyone in the room's practice
- Honest
- How easily to relate it to my business
- How he drills down, organizes larger thoughts – breaks the pile of strategic sticks apart. Specific idea on improving MPT. Refresher on blue dot.
- How to make best use of a conference; focus on what I do best
- How to work with staff; how to be more effective; humor. Used his background and experience to explain these steps to enhance your practice.
- Humor (4)
- I especially liked the latter portion of the meeting; good and thought-provoking ideas
- I found his practice management ideas interesting.
- I like the summary letter in handouts; would save time at work
- I liked the 30 goals and three will do's
- I liked the big picture ideas; organized flowing speaking style
- I liked the blue dot discussion; would be interested in a deeper discussion.
- I liked the focus on how to take action and make the best from attending conference
- I really liked the second half of his presentation. A ton of great ideas and simple concepts to follow. The practice management portion was the most applicable for me.
- I thought he was an entertaining speaker
- Ideas about discovering goals and holding them accountable
- Ideas to mobilize, make changes to enhance practice and lives of clients
- Identifying goals; implement a change based on goals
- Innovative thinking
- Insight following 20+ years of our industry
- Insight, future thinking (effective), change oriented
- Insights for future; challenges for self
- Insights into profession

- Interesting and funny; call to action is strong one
- It was a few points and messages I've heard before and think about how to integrate
- It was good – it provokes thought.
- Last 2/3's was excellent - practice management, etc.
- Learning his thoughts about trends plus his newsletter
- Life planning = goal setting
- Life planning and practice management
- Life planning discussion: Discover, Dream, Design & Deliver. It affirms what our practice is already doing.
- Life planning discussion; tip on delegation
- Looking for the crazy
- Looking forward
- Lots of interesting observations
- Loved that you didn't use a bunch of slides, however, it may be good to use as a summary so people don't need to take a bunch of notes.
- Loved the last half of presentation (or maybe it was last 2/3)
- Low key
- Low key – talked about his experience (good) one step at a time (like that)
- Motivational in the sense that I will go back to my office and make some changes
- Moving my daily activities towards the blue dot
- Next new normal
- Nice easy presentation
- No supplement presentation, just speaking
- Outlook and vision for future
- Philosophy of talking about financial planning as a way to improve clients' lives
- Pleasant manner
- Practical advice on how to improve potential for success
- Practical steps to change
- Practice management
- Practice management advice – the value of change was not lost!
- Practice management ideas and implementation
- Practice management segment
- Practice management suggestions
- Psych tools
- Psychological aspects of financial planning
- Quarterly review to include goals review
- Really showed no new thoughts – he is a compiler of information, but was not insightful
- References to actual advisors and their approaches; experiences
- Relaxed
- Review of articles written
- Saw him recently in Minneapolis – same info presented
- Second half
- Section about integrating the clients goals and objectives into the financial planning process
- Section on life planning
- Sense of humor, relaxed style
- Simplicity of ideas; passion he has shows.
- Some easily applied ideas
- Some good ideas
- Some good points, no use of slides, only talk
- Some humor
- Some of the practical examples he shared regarding how to improve financial planning practice
- Specific steps to make changes
- Specific tasks and to do's; positive message
- Stories (2)
- Sullivan example
- Talking about specifics on working on goals
- Tangible suggestions to incorporate
- Tasks like "write down 30 goals" for us to do
- Thank you for the 4 D's. I'll personally use them and share with clients.
- Thoughtful and thought-provoking
- Thought-provoking
- Three questions to help clients address goals and identify what they really want to do
- Timely
- To do lists, delegate and make changes

- Touched upon most important aspects of financial planning and offered advice on how to improve our business; gave great examples
- Understanding
- Very conversational style
- Very good speaker
- Very relevant information about the future of the industry. Also good practical advice about how to get the most out of presentation in general
- Vision and covering 3 important areas
- Ways to implement ideas from conferences

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

- 10,000 foot view on many topics we hear about a lot – choose one or two ideas to go deeper on
- 2 hours is too long; one hour would be better. A few visuals would be good.
- A little bland
- A little more lively
- Actual advisor examples of how and what changes they made for the better. Break it down!
- Add specific examples/illustrations
- Asking the attendees to raise their hands on numerous occasions was generally ineffective
- Bob tends to be self-deprecating. Don't diminish the value of information he has to share.
- Boring speaker; does not effectively engage large audience. Content wasn't cutting edge. Poor way to kick off conference.
- Come up with more original ideas rather than quote so many others
- Could be delivered in half the time
- Could he have covered his ideas in about 45 minutes – not 2 hours
- Did a great job of wrapping things together
- Energize the investment piece – painful to listen to. Then again, I want to delegate this piece!
- Explore the idea that AV equipment might enhance his message
- Fairly basic and seemed to not have a specific and clear message
- Felt like he was feeding us pabulum in a monotone voice. He is obviously bright, but not a good speaker.
- First part was rough
- Get to point quicker; a little too much conversational
- Give him one hour next time
- Handout "Inside Info" page 2-3 and page 3-4 – don't flow paragraphs from page to page. Disorganized and not well planned handout.
- Have a more useful binder format for facilitating/taking notes, rather than just ads
- Have an agenda so we can follow where you are going. Otherwise, it is not a cohesive and well-flowing presentation
- Have some exhibits or slides to look at. Given the length of his presentation, it was tough to stay focused at times.
- Have some supporting visuals in presentation
- He made some good points, but most of it was fairly basic and I've heard at other sessions. Suggestion would be to bring more depth to presentation.
- He mentioned names and website ... it would have been nice to see the correct spelling or website.
- He writes articles much better than he speaks
- I did not come away with any good take-aways. He quoted Drucker what are we going to change as a result of presentation – nothing
- I heard Bob within the last 6 months and content is the same. Some info is dated. Plus, I read Bob, so my review may be a little harsh.
- I like handouts/PowerPoint to take notes and follow along
- I personally like a PowerPoint or a track to follow for notes so I can review later. Bob is one of my favorite writers!
- I think he should use more examples from his physics/science background
- I thought all the polling of the audience was annoying. An outline would have been helpful. I got "lost" in the topics – which topic, sub-topic, etc.
- I'm going to make some changes. Thank you, Bob.
- I'm not sure I would offer any, for fear of stifling his good way to speak to us in this business of financial planning.
- If we want to explore, in depth, some of the ideas Bob presented, it would be nice to have a reference sheet I could turn to.
- Improve the content of the presentation; a lot seemed recycled from past years, etc.
- Just keep absorbing – refreshing
- Limit the investment discussion

- Looking around the room during the presentation, I saw many people reading or doing other distracting things. Bob should know this.
- Maybe a few supporting PowerPoint items
- Minimize the MTP part
- More content, more ideas
- More meat on the bone
- More on advancing the profession – fiduciary versus broker
- More stats on industry; proof of his vision
- More tactical trends like outsourcing investment management
- More visual support – not necessarily PPT, but an outline?
- More visuals, more statistics
- Need more dynamic speaker in the lead off position – need more visual props (only talking)
- Need more for us visual people!
- Need to talk more about the blue dot
- Needs more good ideas and information. He could have covered his subject in one hour.
- None; absolutely none (several)
- Note paper with the outline to take notes
- Old hat
- Outline following his talk with room for notes (3)
- Outline of presentation/ on screen (2)
- Overall very good
- Overall, it was excellent. Again, I like the focus on practice management.
- Provide summarized handout of key questions and things he is challenging us to do
- Quite a bit of the presentation was not new or innovative – not as forward thinking as I had hoped
- Raise the excitement bar and tell more stories
- Shorten it
- Some information was too basic
- Some sort of structural handout?
- Start out with more energy. First thing in the morning with a laid back approach almost put me to sleep. Use visuals, PowerPoint.
- Summarize whatever steps after making his article
- The delegation piece was a little confusing
- The portion of speech on “market” (his start) – didn’t leave the “power” that the 4 D’s did.
- Too long a set up; shorter
- Use a PowerPoint presentation – to some extent anyway
- Use more recent cultural references to illustrate point – Bonanza?
- Use slides, needs more energy
- Very basic information delivered in an arrogant and demeaning fashion. Offensive comments regarding women.
- Visual aids (3)
- Would like more advanced presentation

### Jacob Wolkowitz & Eric Bjorgen – Basic Asset Allocation

| Rating 3.23 out of 4.0                            | 4   | 3  | 2 | 1 |
|---|---|----|---|---|
| <b>Wednesday • 47 evaluations</b>                 |   |    |   |   |
| Program content 3.089                             | 13  | 24 | 7 | 1 |
| Presentation 3.064                                | 13  | 25 | 8 | 1 |
| Learning objectives met?                          | 11  | 19 | 9 | 5 |
| Materials accurate?                               | 13  | 19 | 5 | 8 |
| Handouts/av satisfactory?                         | 8   | 13 | 5 | 7 |
| Jacob Wolkowitz - Effective presenter? 3.370      | 22  | 21 | 1 | 2 |
| Eric Bjorgen - Effective presenter? 3.378         | 20  | 22 | 3 | 0 |
| Appropriate time allocated?                       | 14  | 28 | 4 | 0 |
| Facilities/tech equip appropriate?                | 12  | 26 | 3 | 1 |
| Presentation was:                                 | Basic: 7 Intermediate: 22 Advanced: 16              |    |   |   |
| How often would you like an update on this topic? | Next Year: 17 Every Few Years: 17 Once is Enough: 4 |    |   |   |

|  |  |
|--|--|
| Wants additional information from Eric Bjorgen:    | Phil Barnhill, Dana Brewer, Del Cerney, Lynn Daly, Larry Flanagan, Joyce Franchett, Georgette Frazer, Jason Hallonquist, Jonathan Jaranson, Joel Johnson, Nadia Keric, Nathan Krampe, Nicholas Kruell, Matthew Nelson, Royce Nies, Diane Park, Mark Rekow, Peter Schmitz, Hilary Van de Streek |
| Wants additional information from Jacob Wolkowitz: | Del Cerney, Lynn Daly, Joyce Franchett, Georgette Frazer, Jason Hallonquist, Joel Johnson, Nadia Keric, Nicholas Kruell, Timothy LaPean, Buzz Moen, Matthew Nelson, Mark Rekow, Peter Schmitz  |

1) What did you like most about the presentation?

- Questions and comments at anytime; very good Q & A (2)
- It's always good to learn what other folks in this business are doing. So both speakers and their insights were appreciated.
- Interesting commentary
- Questions and responses
- Good material – good Q & A
- Expertise of presenters
- Talk about how to sell when needed
- Re-enforced my need to utilize outside money managers in certain situations
- Very good & interesting info. I like the Accredited info more because it was more relevant to my world.
- Opinions and outlook
- Good to hear from both practitioner and market research perspectives
- Insightful

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

- More structured based on Basic Allocation
- More take away application opportunities
- There is a conflict between asset allocation from a practitioner vs a fund perspective
- There was nothing basic about this
- Format was disorganized and devolved to Q & A
- A hard copy of the presentation would have been good
- Would like to hear how to bring this info to our clients. I felt this presentation was more on how they did their allocation instead of how we can allocate for our clients.
- When I consider "basic asset allocation," I think of asset classes that may or may not work in the future. This was not basic in all dimensions of the topic discussed.
- Opening statements were more intermediate to advanced than basic.
- Probably a more formal slide support to their positions, but because it was more a panel, may not have been possible.
- Better handouts that more detailed the outline
- More take-aways for practice
- Talk to the level of the audience
- The title of the session needs to match the content. This was not really a session about Basic Allocation. I expected a totally different presentation than I got.
- It was a bit too formless and sprawling in format.
- My primary reason for coming was to glean wisdom to help me create emotional maturity in clients... I didn't get much help.
- They jumped right into advanced

### Jacob Wolkowitz & Eric Bjorgen – Advanced Asset Allocation

| Rating 3.32 out of 4.0                       | 4  | 3  | 2  | 1  |
|--|----|----|----|----|
| <b>Wednesday • 122 evaluations</b>           |    |    |    |    |
| Program content 3.322                        | 50 | 56 | 12 | 0  |
| Presentation 3.197                           | 39 | 62 | 16 | 0  |
| Learning objectives met?                     | 38 | 60 | 15 | 0  |
| Materials accurate?                          | 18 | 47 | 26 | 4  |
| Handouts/av satisfactory?                    | 11 | 35 | 29 | 14 |
| Jacob Wolkowitz - Effective presenter? 3.365 | 51 | 55 | 9  | 0  |
| Eric Bjorgen - Effective presenter? 3.403    | 52 | 56 | 6  | 0  |
| Appropriate time allocated?                  | 42 | 63 | 12 | 0  |
| Facilities/tech equip appropriate?           | 25 | 65 | 13 | 4  |

|  |  |
|--|--|
| Presentation was:                                  | Basic: 3 Intermediate: 63 Advanced: 41   |
| How often would you like an update on this topic?  | Next Year: 71 Every Few Years: 28 Once is Enough: 4  |
| Wants additional information from Eric Bjorgen:    | Charles Anderson, Douglas Barinsky, Phil Barnhill, Paul Block, Stephen Bowman, Byron Ellingson, Andrew Feterl, Andrew Fishman, Larry Flanagan, Jason Hallonquist, Echo Huang, Jonathan Jaranson, Nadia Keric, Michael Kobs, Laura Kuntz, Debra Kuper, Timothy LaPean, Joni Meilahn, Mike Miller, Matthew Nelson, Richard O'Connor, Diane Park, Mark Rekow, Timothy Riley, Kent Schutte, Fred Sowatzka, Robert Steffen, Andrew Tufford, Hilary Van de Streek, Bruce Wagner, Nate Wenner, Damian Winther, Jean Wolfe |
| Wants additional information from Jacob Wolkowitz: | Charles Anderson, Paul Block, Stephen Bowman, Andrew Feterl, Andrew Fishman, Jason Hallonquist, Nadia Keric, Michael Kobs, Debra Kuper, Timothy LaPean, Joni Meilahn, Daniel Myers, Matthew Nelson, Richard O'Connor, Mark Rekow, Kent Schutte, Fred Sowatzka, Andrew Tufford, Damian Winther, Jean Wolfe  |

1) What did you like most about the presentation?

- What they look into for tactical decision making
- Title better matched to coverage of topic
- Good thoughts
- Both know their "stuff"! Good Job.
- Fantastic expertise
- Allocations and the issues that drive them
- Good Q & A; response to questions (2)
- Eric Bjorgen's explanations of the Leuthold process
- Timely, always an interesting option to hear what others are doing
- Alternative energy – bond – difference asset class discussion. Good choice to have backup question to move discussion forward.
- Understanding asset allocation techniques
- Discussion regarding specific asset classes
- Good information and perspectives
- Good topic – poor presentation format
- Opening the presentation to attendee questions
- Generally... good information
- Hearing both presenters comments side by side
- Specific info... good.
- Future outlook
- Their knowledge and willingness to share
- Good topic, good info
- Hit the right high points. Combination of mutual fund manager with investment advisor
- Two speakers was great. (2) I liked the back and forth with differing perspectives. I think two speakers for this topic is perfect! Opinion comparison is good.
- Good subject matter/good discussion (2)
- Covered a lot
- Specific discussion on sectors – overweight & underweight & longer term view – trends
- Great global perspective
- Outlook opinion
- Good info to review – felt conversational
- Good dialogue without hype
- Jacob & Eric were knowledgeable (2)
- Having 2 presenters and 2 different viewpoints
- It was "current" information
- Insightful

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

- Moderator should have introduced herself and the format & objectives
- Handout should have been developed
- Split the "Advisor View" from the "Fund Mgr View"
- Could not see the panel
- Not a lot of difference between basic and advanced – mostly in questions
- Need to see who's talking
- Wish they would have stood up – much more energy when speaker stands.
- Lacks theme or common hypothesis
- Handouts and some concrete info to work with

- I attended both basic and advanced sessions – there was really no difference. A suggestion for basic: just define terms initially and then as you go along, but keep some content.
- More structure
- Raised platform for panel
- Better handout of each presenter's outline and models
- Have Part 1 and Part 2 in the same room
- Need to stand – can't see you from the back rows
- Briefly discussed the major trend index, but it would be helpful if they expanded on how the MTI drive their asset allocation tactical moves
- It was a little hard to see Jacob and Eric. If speakers are going to sit down in a larger room, it would be helpful if they could stand or sit at a table on a stage.
- More charts/graphs to illustrate points
- Wouldn't mind charts etc...
- Transition from Basic – I attended both with were very similar.
- More detail
- Just fine as is
- Include education materials or white papers as notebook handout
- Room was hot
- More specifics
- I would say a prepared presentation would be better than a panel – this method tends to jump around...there are no handouts
- Provide more specific tools on how to look/implement tactical asset allocation in various practices
- Should stand when speaking
- Really didn't find anything to apply to my practice
- Maybe have one more panelist

### Financial Essentials – Joe Pitzl, Nick Thunker, Jeremy Oliver, Ben Wacek

| Rating 3.77 out of 4.0                      | 4   | 3 | 2 | 1 |
|---|---|---|---|---|
| <b>Wednesday • 10 evaluations</b>           |   |   |   |   |
| Program content 3.70                        | 7   | 3 | 0 | 0 |
| Presentation 3.70                           | 7   | 3 | 0 | 0 |
| Learning objectives met?                    | 8   | 2 | 0 | 0 |
| Materials accurate?                         | 7   | 2 | 1 | 0 |
| Handouts/av satisfactory?                   | 7   | 1 | 1 | 0 |
| Nick Thunker - Effective presenter? 3.80    | 8   | 2 | 0 | 0 |
| Jeremy Oliver - Effective presenter? 3.80   | 8   | 2 | 0 | 0 |
| Ben Wacek - Effective presenter? 3.80       | 8   | 2 | 0 | 0 |
| Joe Pitzl - Effective moderator? 3.80       | 8   | 2 | 0 | 0 |
| Appropriate time allocated?                 | 8   | 2 | 0 | 0 |
| Facilities/tech equip appropriate?          | 8   | 2 | 0 | 0 |
| Presentation was:                           | Basic: 7 Intermediate: 3 Advanced: 0  |   |   |   |
| How often would you like to hear Roy speak? | Next Year: 5 Every Few Years: 3 Once is Enough: 2                                       |   |   |   |
| Wants info on FPA membership:               | Julianne Poggemann, Kathleen Ritter, Nick Ternes  |   |   |   |
| Wants info on 2010 Career Day:              | Nathan Faith, Derek Grant, Julianne Poggemann, Kathleen Ritter, Nick Ternes, Luke Wacek |   |   |   |

1) What did you like most about the panel presentation?

- Advice on what to expect, what to do
- Young guys, can relate
- It was information that I will actually be able to apply in my future career – very helpful!
- Advice for young planners/college grads
- Good audience and panel interaction
- Learned a lot

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

- Don't feel like you have to give a long answer