

SYMPOSIUM 2010: Planning for Success

Attendee Evaluation – Comments from up to 470 registrants

OVERALL SURVEY

Exhibitor Interaction:

Rating: 3.16 vs. 3.39 in 2009 vs. 3.30 in 2008 vs. 3.19 in 2007 & 3.33 in 2006	4	3	2	1
212 evals compared to 159 in 2009	64	120	25	3

Meals, Beverage Breaks:

Rating: 2.76 vs. 3.02 in 2009 vs. 3.22 in 2008 vs. 3.31 in 2007 & 3.15 in 2006	4	3	2	1
218 evals compared to 164 in 2009	38	104	61	15

Reception:

Rating 3.42 vs. 3.31 in 2009 vs. 3.29 in 2008 vs. 3.31 in 2007 & 3.38 in 2006	4	3	2	1
84 evals compared to 63 in 2009 (82 Yes, 132 No)	44	34	3	3

Meeting Location:

Rating: 3.58 vs. 3.55 in 2009 vs. 3.61 in 2008 vs. 3.50 in 2007 & 3.68 in 2006	4	3	2	1
229 evals compared to 163 in 2009	142	79	7	1

Value for Price:

Rating: 3.36 vs. 3.50 in 2009 vs. 3.52 in 2008 vs. 3.55 in 2007 & 3.50 in 2006	4	3	2	1
219 evals compared to 164 in 2009	94	111	13	1

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

- "Short" lunches allow for calls/networking w/ no presentation
- 20 minute breaks, 2nd floor!!
- All of the main speakers!
- All programs
- Always good topics w/ useful info, well organized
- As always: well organized for all materials, great speakers, lots of people ~ good networking, location, liked how CE was handled
- Behavioral Finance sections, Ethics & Fiduciary programs
- Better facilities, excellent speakers
- Bob Keebler & Ross Levin
- Bob Keebler & Stuart Bear
- Bob Keebler, Ross Levin, Marianne Smythe, Econ Panel
- Bob Keebler's analysis – extremely helpful, simple lunch is good & efficient, Stuart Bear's Estate update at right level, broke up drawings during day
- Breadth of topics, pace was good
- Breakout choices, economists panel
- Caliber of presenters, very good
- CE credits
- CE credits & Tax session
- Chris Waller & Bob Keebler
- Chris Waller & Bob Keebler presentations; opportunity for break-out sessions Day 1 afternoon
- Chris Waller & Marianne Smythe
- Christopher Waller & Economist Panel (2)
- Christopher Waller, Ross Levin presentations
- College presentation, well organized

- Content/Quality of Speakers, chance to network
- Currency of topics, variety of speakers
- Cutting Edge Tax Session (3.8%), high quality speakers overall – excellent work
- Diversity of speakers
- Diversity of subjects, quality of speakers
- Easy to attend, great facility
- Easy to get to most partners/good layout; wide array of speakers and very good speakers!
- Econo panel, college planning
- Econo outlook, Robert Keebler, mainly large group presentations vs. many breakouts
- Economic Overview (6)
- Economic Overview – with David, Jerry & Rich; Keebler's presentation
- Economic Overview by panel of 3 is great! Fed comments (Day 1)
- Economic Panel at end of Day #2
- Economics Panel & keynote speakers
- Economist Panel & Ethics Credits (2)
- Economist Panel & Tax Updates (4)
- Economists panel, Elder Law update
- Excellent speakers & networking
- Excellent speakers & topics
- Excellent speakers and content, relationship building with other financial planners
- Excellent speakers, every person presenting was polished as well as being knowledgeable, this makes the days flow well
- Excellent speakers, nice breaks allowed some business to continue
- Excellent speakers, well organized
- Excellent topics, very great Continued Education planned out – more – the better
- Focus on Ethics, the economy and new rules, regulations, & enforcement; short lunch periods
- Good content, ease of submitting CE, well organized
- Good length, great topics – especially Economy, Taxes & SEC
- Good quality of speakers, timely topics & mix of gen session/breakouts
- Good topics, knowledgeable speakers
- Good topics: Social Security, Taxes, Economy
- Great attendance – Elder Law review, Marianne Smythe
- Great attendance #'s, good speakers/CE
- Great content, well executed, better location, better upstairs vs. in basement
- Great line-up of speakers; having a non-mutual fund economists
- Great location & agenda
- Great speakers
- Great speakers & CE
- Great speakers, good topics
- Great speakers, needed credits, nice vendor booth presentation
- Great topics, economists panelists
- Great, unbiased, quality education; camaraderie with peers
- Having most of the meeting in the "Big Room," credits, great speakers
- High educational content of presentations; ability to obtain bulk of required CE hours & Ethics course in 2 days!
- High quality of presenters; it's always good, but seemed a bit better this year
- I always enjoy the variety of topics & speakers, and the quality of their presentation. (Seems to get better each year!) The Economist Panel is a 'cannot miss'. David, Jerry & Rick are outstanding! I also enjoyed & appreciated Marianne Smythe's presentation!
- I like how you brought in a Federal Reserve speaker to start things off. Also liked how you helped us college students to get interacted with this wonderful program.
- I love the credits all in 2 days, good program content
- Information & networking
- Informative, well run
- Just back from Denver – this convention 10x's better
- Less moving from room to room
- Levin presentation, Stuart Bear – medical assistance
- Liked that speakers set up in middle of room, rather than end
- Location above ground, presentations were all good, not too rushed
- Location good (lots of room), lots of good content from speakers, binder with all overheads was good
- Location, dates
- Location, good speakers/topics
- Location, speakers
- Lots of presenters and CE credits, no wasted time – stuck to the schedule

- Loveland & Keebler presentations
- Lunch line moved very efficiently
- M. Smythe's ethics session, refreshments were readily available
- Marianne Smythe & Keith Loveland
- Marianne Smythe's presentation, Economists Panel
- More comfortable sitting @ round tables, Marianne Smythe
- Networking & CE credits
- Networking & reception
- Not being in the sub-basement, good reception
- Overall great speakers
- Overall quality of presentations
- Overall, very well organized and professionally coordinated
- Panel, any Behavioral....
- People I interacted with, some really good speakers
- Presentations/Quality of Speakers
- Quality of speakers, obtaining ethics credits
- Quality speakers with meaningful presentations; facilities are perfect for this size of group
- Reduced paper option for notebooks
- Ross Levin & Stuart Bear
- Ross Levin, Stuart Bear, Bob Keebler (2)
- Ross Levin & Robert Keebler
- Speaker line up was outstanding, well organized
- Speaker Marianne Smythe & Keith Loveland – able to get 3 hrs. ethics requirement in a relatively painless way!
- Speakers
- Speakers – Christopher Waller, Ross Levin, Marianne Smythe, Stuart Bear & Economic Panel; Volunteers – Thank you; Partners support – Thank you!
- Speakers – Stuart Bear & Bob Keebler
- Speakers & content
- Speakers overall were very good – topics were timely; organization was excellent
- Speakers were easy to follow & entertaining
- Speakers, exhibitors, and food were all wonderful; thanks for including the hot cider
- Stuart Bear – Elder Care & Economic Panel
- Stuart Bear – planning strategy, Chris Waller – awareness of where we are
- Tax presentations, economists, CE credits
- Tax update & Economic panel
- The credits obtained, the Economic Overview
- The panel and Christopher Waller; did a good job at addressing current economic conditions.
- The presentation on Medicare surtax & the economy looking toward 2011
- The speakers were all polished, interesting speakers. The FPA did not have bargain-basement speakers; topics hit many areas – it was not overly-focused in any one or two areas
- The Symposium staff was wonderful! Marianne Smythe – Fabulous!!
- The topics covered, and experts in those areas
- Time to learn about/interact w/ partners, exp. Silver/Supporting; networking
- Top notch speakers
- Topical information, as usual, good quality speakers, great job, everybody! (I prefer this round table (audience) format)
- Topical program & centralized location
- Up to date information
- Upstairs!! – Bob Keebler
- US Economy in 2011 & Economist Panel
- Variety of topics
- Very good speakers, interesting and pertinent topics
- Very pertinent info w/ all upcoming tax & estate changes as well as good info w/ state of the economy
- Well respected speakers, timely insights, slides very good
- You had great speakers, I am glad you had a Federal Reserve speaker

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

- 3 breakout sessions I wanted to attend were all at the same time
- A little cold the 2nd day
- All the time spent on portfolios
- At \$30/sandwich, it was about a \$45 meal, I'd prefer that the symposium cost be reduced by that amount and I'll bring a \$5 sack lunch that is much better.
- Black & white slide prints; my CFP designation wasn't on my tag. (Vanity, I know.)

- Breakfast burritos
- Breakouts
- Breakouts, small lunches
- Breaks too long
- Breaks too long; standing for lunch among exhibitors
- Breaks were fine; Meals & snacks were hard to find or already out in some cases
- Choosing the "green" binder was a mistake, I thought I would have time to print the handouts myself, the projector was not as bright or clear as the other side of the room.
- Cold rooms
- Cost (2)
- Crowded room, I like a little more space
- Day 1 seemed to be lacking the "meat & potatoes" that I am used to at this event; I didn't feel like I took home a lot of items to use in my practice
- Day 2 – not able to choose from a second speaker/topic; Bob Keebler – too long – lots of info but deeper than necessary if not a CPA
- Day 2 breakfast clearly leftover from day 1 as rolls/muffins/bagels hard as rock; lunch was very inadequate – Day 1- only 6 sandwiches left (all same kind) when I went thru & a few scoops of potato salad – nothing else.
- Did not like back-to-back presentations w/ same speaker on similar topics – break it up.
- Disappointed in M. Smythe's presentation, she's typically much better
- Distance to coffee from main room
- Elder Care talk was interesting, but did not pertain to my clientele; not enough Life Planning topics
- Ethics Breakout – exact repeat; long breaks & numerous breaks, plus hard to understand Charles Buck
- First day speakers were not as good as in prior years
- First time ever, since 2001, where I could not find a place to sit.
- Food & ?
- Food & layout of main room
- Food runs out; can't think of anything else – nice job!
- Food; layout for partners
- Food; prefer sit-down lunch
- Food; time allowed for questions, not enough
- Foreign stock/bond presentation
- Global Investments (Milev) (2)
- Going green w/ the booklet, some sponsors didn't put the info on the overhead (S. Bear) or had extra material (Keebler) that would have been nice to refer to while he was speaking
- Handouts were not included if you only attended one day – some are necessary
- Having to turn in hourly evaluations
- Heavy emphasis on earning CE...is this what all chapters do? Town Hall Meeting. I love to learn, and it was difficult to find breakouts that excited me. No clear list of what objectives were for each session
- Huge notebook! I didn't ask for handout either. Food: breakfast – day 1 (day 2 – OK); lunch – both days; dessert – both days
- I have to file my own CE credits with the ND Ins Dept; the symposium is too close to the FPA Denver 2010 meeting
- I would have liked to attend most of the breakout sessions, however, because I needed the Ethics credits, I had to miss all of these breakout sessions
- If you needed Ethics credits, you had no opportunity to attend breakout sessions; Economic sessions was far too long
- Improvement in speaker handouts
- K. Loveland's presentation on Ethics, needs updated course; so many people have seen this one (today's) already; Stuart Bear had very elementary presentation, speaking to majority CFPs!
- Lack of a speaker that specialized in Growth/Motivation as a Financial Planner.
- Lack of food
- Lack of options with regard to presentations
- Lack of planned networking for newer FPA or Non-FPA members to Symposium; choice of level of presentation for new planners, more introductory
- Length of last panel session – too long without a break – people coming & going
- Liked it all
- Location – hate downtown; lunch – give us some variety
- Location – parking, convenience; ran out of most food items both meals on 1st day and breakfast on 2nd day.
- Lunch (need healthier food!) but thanks for a one-hour time on Day 2, so we could go out. 3.5 hrs of economics, while interesting was quite a bit
- Lunch choices
- Lunch has been better in past years; at times, the sound from the podium was hard to understand
- Lunch lines still seemed to cumbersome

- Lunch was very unprofessional & didn't provide enough. Chips – snacks at break, coffee should be in main room or on tables – cheaply done
- Lunch; couldn't attend Ethics and Breakout sessions (Ethics both days option)
- Make sure 2 hour sessions take break; start opening day at 9:00 for those traveling in from outstate & go later in the day
- Meals – didn't get a choice Tuesday, was one of last through line; speakers that went 2 hrs – seem to need a break; great speakers, but hard to stay focused for 2 hrs.
- Meals & 2 hour presentation need breaks
- Meals were just barely adequate; parking is up from \$10 - \$16
- Meals: Not enough – running out; Location: Perfect, VFP: conference good/ lack of food
- Milev presentation – not a bad presentation – just not as relevant as others; lunch line was long & cut into networking time they should try more than 2 stations
- Milev program – should be a BO session – limited applicability
- Missed FPA library
- Missed the cookies – my fault again!
- Most topics & examples applied to high net worth clients & not the avg. middle class client so lots of info did not apply to my clients
- Need more lunch stations – 4-6 tables two sided
- No bottled water (except at lunch); Tax presentation was too indepth, not necessarily relevant to practice
- No bottled water, but lots of pop. Water needs to be refilled at tables during break.
- No options with regard to certain presentations (breakout sessions); Technical information presented (too much)
- No Protection Advocacy, all strategies are reactionary instead of Proactive Planning like insurance
- No sit down luncheon, large room w/ 2 screens – not behind speaker
- Not enough variety of speakers; seems very similar to previous years
- Not having info on screen
- Nothing – all good
- Nothing I didn't like (2)
- Parking – consider a hotel in suburb every 3 years or so?
- Ran out of chips at lunch on 1st day; 2nd day needed more breaks (10-12 slot)
- Reception was crowded & long lines
- Room set-up for the breakout sessions & not knowing that we should have received the prints of the slides a head of time
- Room temperature was too cold (2)
- Room was cold, I didn't enjoy foreign markets presentation
- Ross Levin & Elder Law
- Ross Levin & Food (lunch)
- Ross Levin's presentation should consider condensing down his content to a shorter presentation
- Ross Levin's talk lacked substance
- Round tables are not as comfortable to take notes; missed Jack Surgent
- Screen in main room/center screen would help
- Seating arrangements – prefer long tables so everyone can face the front with a table in front of you
- Set up for meals, Stuart Bear
- Small lunch – few options
- Small vendor showing
- Some of the 2-hr programs were too long
- Space in the main room was pretty tight; main room – cold both days!
- Speaker line-up was not as “deep” as previous years
- Speakers that did not relate on how their topic related to my practice, where, when, how benefit practice
- Speakers were good, but not one was dynamic & memorable; too many speakers on the economy, need more diversity
- Suggest if way to define market for presenters, i.e. Keebler presentation applies to \$250,000 income client. Was not applicable to my practice
- The breaks are too long, we didn't need ½ hr between speakers, I would rather end earlier
- The close proximity to FPA National conference
- The digital fraud presentation was entertaining, but had very little real content
- The first day got a little long, perhaps a slightly longer lunch would be beneficial. All food and snacks were great, however if you had a bigger lunch and then took away a snack, this would be good
- The speakers introducing the sessions were very bland; the Bob Keebler presentation was too much info delivered too quickly
- The temperature was super cold in all meeting rooms (esp. on day #1); everything else was great
- This Convention Hall level wasn't great for our sponsors
- Too close to FPA Denver; seemed a bit cramped in the space allotted
- Too many breaks; all speakers need to have PowerPoint slides

- Too much emphasis on taxes in an uncertain environment
- Too much focus on estate tax – how about Roth, financial distress, 2010 planning? Tax speaker too narrow focus; no Jack Surgent – this is what I come for!
- Valdimir Milev
- Valdimir Milev & Bob Keebler
- When I wrote out my commentary, I mentioned that I didn't like the food. Actually the breakfast was **wonderful** & since I'm a breakfast person I much appreciated the oatmeal, fruit, juice, etc. It was the lunch & the reception food that I didn't like.

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

- 1st one; let you know after next year
- A salad for lunch
- A sign directing to meeting rooms to avoid wandering up & down corridors
- Add diversity to vendor booth representation, e.g. legal, tax, health care
- Although I really like Keith Loveland, I encourage you to seek others to provide ethic courses as well. Marianne Smythe did a great job! The above comment is relation to Stuart Bear as well. He does a wonderful job, but this seems like the 3rd, 4th, or 5th time the Minnesota FPA has used him at a Symposium or monthly meetings
- Better signage in direction of meeting rooms for various breakout sessions
- Better speaker line-up
- Bigger tea/coffee cups; more food/snacks
- Break snacks were kind of wimpy – most ran out
- Consider advanced planning track for members with 10-15+ years experience/study group format?
- Consider making the Ethics a general session so we can take advantage of additional breakouts
- Create less repeat in planning-strategies classes
- Different location
- Enough food for all
- Ethics & Econ sessions need to be shortened or other time for Practice Management breakfast sessions; have a panel discussion on charitable planning, MN Planned Giving Council could provide speakers
- Everything is awesome except make sure the lunches are decent & the dessert stations don't run out!
- Exhibitors/Sponsors need to develop a plan for better interaction w/ attendees
- Food/Breaks
- For 'walk-in' attendees (not pre-registered) – I paid a premium because I did not pre-register – but then I was penalized (again) by not receiving speaker notes in my binder. If I do not receive all materials walking in – I should get a discount vs. pay a premium! I have zero 'notes' from day 1.
- For drawing Partners, should have one of the volunteers or speaker draw name
- Good job! Thank you
- Have diet pepsi
- Have more breakout sessions; speakers have been better in previous years, maybe find one or two "headliner" speakers
- Have Nick Murray as speaker next year
- Healthier food options; breaks every hour – sitting for 2 hrs too long
- Hold the Ethics CE as a 3 hour block – do not separate it
- I thought it was great
- I would love to be able to purchase tapes (CDs, really) of the various speakers
- If possible, have more snack items available during the breaks, one sometimes needs an energy boost during the more complex topics; other than that, excellent symposium!
- Improve meals
- Keep format – excellent; maybe more everyday advisors or presenters
- Keep it up
- Keep this second floor setting
- Keep up the good work
- Keith Loveland is great & I attended, but somehow wish I could attend the alternative sessions during that time period
- Length of breaks
- Longer lunch
- Love the "green books" option – but presenters need to know about IP & have Power Point presentations
- Make sure food doesn't run out
- Make the beverage stations closer to the meeting room
- Market Rotation by Quantitative Advantage
- Meals, Beverage Breaks: more stations to have shorter lines
- More breakout sessions (2)
- More dynamic MC & those who introduce speakers

- More food & desserts
- More on Low Alternative Investments fit into a clients portfolio
- More options to see other presenters, several each hour
- More salads – less carbs!
- More small group, breakout, interactive sessions
- More specific tax ideas, investment ideas, less sessions like bashing on SEC (no take aways)
- More topical information on the economy
- None - Great Symposium!
- Need bottled water at refreshments throughout the day
- Need more water available (bottled)
- Need to find a better way to serve lunches. Make sure (encourage) all speakers to use overheads.
- New ethics material
- No 2 hr presentations, too long
- None (7)
- None, committee did a great job
- Options for speaking engagements (more)
- Print all material for all
- Repeat
- Require all speakers to have a Power Point presentation; I'd like to hear Ed Slott again sometime
- Run breakout presenters 2x, or tape them (?); breakout on practice transition/sale/etc...; make serious attempt to help career changers, not lump them in
- Salads at lunchtime
- Set up food right outside doorways, with more access to it; food took long to get, w/ short break due to long lines
- Shorter breaks to reduce total time at Symposium
- Speaker on insurance; lighting was poor
- START ON TIME!!! 10 minutes late on Stuart Bear's Elder Law and it was a 50 min talk
- Tax, Tax – add some investing topics for the advisors managing portfolios
- The most valuable area to me is the Tax Planning and Estate Planning by far
- This is my first Symposium so I have nothing to suggest this year
- Too much dwelling on '08-'09 recession; bring back Roy Diliberto; session on RIA compliance – not just ethics – should be included at every FPA Symposium
- Very much absent was the discussion of risk management, i.e. insurance as in life, long term care, & durability
- Video of speaker, more breakout sessions, less large group sessions
- Why should I go "green" on the manual if I need to print all documents for the speaker's presentation
- You manage the costs beautifully – THANK YOU for keeping the cost so manageable

General Comments:

- Actual income distribution models & techniques.
- Another great 2 days – thanks for all the work!
- Bonnie does a fantastic job – but give this a thought. Thanks. (For 'walk-in' attendees (not pre-registered) – I paid a premium because I did not pre-register – but then I was penalized (again) by not receiving speaker notes in my binder. If I do not receive all materials walking in – I should get a discount vs. pay a premium! I have zero 'notes' from day 1.)
- Enjoyed Symposium – great values for price, good opportunity to network w/ other planners. Well organized, we were well taken care of.
- Enjoyed the seminar, very good.
- EXCELLENT Conference. I also went to the National in Denver. You shine over them due to 2 big areas; 1. You gave more CE credits in less time, and 2. You had more timely speakers (relevant to economic issues). Thanks & keep up the great job!
- Exhibitor Interaction: plenty of time to internet; Meals=poor, beverage=adequate; VFP: Forgot how much I paid
- Exhibitor Interaction: some seemed tucked away; Meeting location: space seemed small, esp. for exhibits; VFP: very good
- Exhibitor Interaction: too weak; Meeting Location: Great!
- Facilities are too cool/cold
- FPA staff was very well organized, very courteous and accommodating.
- Good job overall
- Good job! Definite improvements in format!
- Good job! Well worth the time & price
- Good overall conference, thanks.
- Great conference
- Great Event, as always!
- Great job – I will definitely recommend to my colleagues
- Great job everyone!

- Great program! Keep it up!
- Great Symposium as always
- Great Symposium!
- Had a good time
- Help finding sessions & needs are very different partners...What resources exist/how can I find a good estate planning lawyer, tax advisor, etc....
- I didn't print materials or request them to save and then needed them for a couple of sessions
- I do not think the exhibitors understand the 'slip' process for talking with them. Maybe concentrate on making this more clear.
- I had a wonderful experience and look forward to joining the FPA when I graduate from college.
- I liked the main room and layout better than last couple years; podium microphone was bad, however; maybe need better communication about location of certain events, like Reception and Breakout Sessions
- I've attended the Symposium since its inception & it gets better (except for food) every year. Kudos to all!
- If you want people to listen, your director needs to speak louder/clearer.
- In fairness, I was not in attendance all day for both days; as usual, great job by the Symposium committee
- Kept running out of pickles – both days.?
- Layout of vendors didn't seem to flow very well. Not sure how it happened, but I missed a few.
- Lunch format leaves something to be desired; prefer a place to sit & possibly a lunch speaker as in past
- Make people use mics
- Meals, Beverage Breaks: Excellent supply of beverages, lunch a little skimpy if you're not a chip person
- Meals, Beverage Breaks: Too long
- Meeting Location: Great location
- Need to change up the program a bit
- New system replacing 'bingo' – good
- Nice job(2)
- Overall great conference! Thank you
- Overall, a solid function
- Overall, thought Symposium was very informative
- Overall, very good
- Overall, well done, thank you! * I am concerned about Ethics class (Loveland) counting toward CFP CE two years in a row.
- Placement of the FPA membership booth should be near registration; look for ways to incentivize joining
- Q & A was most effective when presenters repeated questions
- Room too cold!
- Symposium 2010 Committee Members did a great job!
- Thank you for putting this on!
- Thanks Bonnie for all you do!
- Thanks to Bonnie and the committee for your efforts in making this a CE event worth attending!!
- Thanks tons to the wonderful committee members who put this together
- The 1st day reception was quite nice – the room used was cool, fantastic view. Really great – I attended again this year.
- The general session room was more spacious than last year – much more comfortable!
- They should use a slide or pass out the document they refer to for it to be meaningful
- Things were run extremely efficiently and my experience was valuable.
- Value for price: Great value, wonderful event!
- Well done – overall, Thanks!
- Well worth the time invested! Appreciated the prompt emails from Bonnie. Thanks
- Will volunteer to help in 2011

I am interested in serving on a Committee:

- Fin'l Lit & Stability & Pro Bono – Becky Botzet 952-941-2795 x11 Email: beckybotzet21@hotmail.com
- Partnerships – Doug Cozad 952-449-4412 Email: dougcozad@gmail.com
- Pro Bono – Ellen Fee 612-376-9891 Email: ellen.fee@mcgladrey.com
- Fin'l Lit & Stability – Ben Auckenthaler 952-746-9456 Email: benjamin.w.auckenthaler@ampf.com
- Symposium in 2011 – Lynn Daly 651-379-3933 Email: ldaly@focusfinancial.com
- Government Relations – Jerry Brennan
- Where the need is greatest –Jerry Brennan 651-229-6021 Email: g.brennan@wos.com

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

- Karen D'Aloia
- Danica Goshert
- Jesse Daniels
- Lynn Daly
- No name

Christopher Waller – The US Economy in 2011

Rating 3.61 out of 4.0		4	3	2	1
Tuesday • 402 evaluations					
Program content	3.58	239	143	7	3
Presentation	3.58	245	148	5	3
Learning objectives met?		244	145	15	3
Materials accurate?		249	127	16	3
Handouts/av satisfactory?		213	150	21	3
Effective presenter?	3.67	274	108	7	3
Appropriate time allocated?		227	153	11	4
Facilities/tech equip appropriate?		205	156	24	2
Presentation was:		Basic: 35 Intermediate: 303 Advanced: 44			
How often would you like to hear Christopher speak?		Next Year: 227 Every Few Years: 171 Once is Enough: 6			
How often would you like an update on this topic?		Next Year: 332 Every Few Years: 46 Once is Enough: 3			
Wants additional information:		Betty Anderson, Robert Aylin, Chad Babcock, Kurt Baldry, Dana Basballe, Kyle Beatty, Nicholas Beissel, Sophia Bera, Sharon Bloodworth, Charles Blossom, Patrick Boria, Michel Boursier, Gerald Brennan, Anthony Brinda, Marilyn Broussard, Gregory Brown, Steve Bullert, Alex Bush, Trever Christian, Theodore Contag, David Cook, Charles Cooper, David Daline, Larry DeGraaf, Perry Diede, Paula Doroff, Scott Bye, Sharon Calhoun, Leo Carton, Kathy Chen, Ford Droege Mueller, Bruce Ensrud, Chad Essman, Douglas Faust, Noelle Follen, Scott Foreman, Dennis Gianoli, Danica Goshert, Paul Greengo, Joseph Gribben, Gary Gallagher, Richard Schlueter, Justin Gullekson, Stephen Hampton, Travis Hansberger, Pamela Heimdal, Steven Heimermann, Robert Hengelfelt, Michael Hess, Michael Hochstetler, Lori Hoefener, Jason Kley, Gerald Knutson, Michael Kobs, Brian Kompelien, Kenneth Kramer, Kent Krueger, Debra Kuper, Elissa Larson, Doug Last, John Lawien, Paul Light, Jerry Lund, Patrick Lundy, Nick Thunker, Lynn Daly, Dean Maschka, Lucretin Mattson, Jennifer McCool, Brian McKnight, Sean McTeague, James Mertz, Mike Miller, Christopher Mongeon, Eric Munkeby, Timothy Munkeby, Michael Murphy, Troy Noor, Brad North, John Oberg, James O'Halloran, Gary Oliver, Berthel Olsen, Matthew Osborne, Benjamin Potthoff, Bryan Pratt, David Pratt, Thomas Ratelle, John Rehl, Mark Rekow, Peter Rekestad, Timothy Riley, William Rothschild, Lauri Salverda, James Sanders, Channing Schmidt, Kent Schutte, Karl Schwartz, Ben Setterlund, Ryan Shannon, Greg Snider, Robert Steffen, Elizabeth Stromberg, Melissa Sturdevant, Fredrick Sundquist, Andrew Tate, Dean Tesch, William Toops, Charles Vomacka, Ronald Wall, Thomas Walsh, Rosemary Ward, Nate Wenner, Damian Winther, Joshua Wolberg, Erich Zellmer			

1) What did you like most about the presentation?

- A good review of basic aspects of the current economic situations
- A look into the feds head
- All
- All easy to follow with slides and talk
- Being able to listen to the view point of someone from the Fed
- Charts, presentation, style – education
- Charts/graphs
- Clarity and some humor
- Clarity of information
- Clarity with how he described the economic crisis
- Clear
- Clear and easy to understand – Great humor
- Clear explanation of fed actions and intent
- Clear explanations of charts and graphs – Nice job! Excellent explanation of the role of the Fed in a crisis – what they did and the outcome
- Clear historical graphs to help understand what happened and to project future clients
- Clear, concise and accurate
- Clear, concise, did not paint an unrealistically optimistic picture; used “Scary” several times
- Clear, focused presentation
- Clear, good info, good slides, very in touch! He is great!
- Clearly explained economic issues
- Clearly focused on key data – not data overloaded
- Clearly laid out the facts

- Complex – made simple
- Concise and nice flow to it
- Concise, clear, synthesized
- Confirm existing thoughts
- Content
- Cover crisis with banks – Made income of crisis for Fed – Excess of housing 3 million
- Covered many areas of economy
- Cutting edge on what is going on
- Data
- Data review
- Direct and “regular English,” not econ jargon
- Easy to follow and understand content (3)
- Easy to understand – Funny – Good pace
- Easy to understand – Timely
- Effective communicator – Very good!
- Energy
- Engaging speaker
- Engaging speaker, especially for economics
- Enjoyed his analogies, his comparison to movies, his comments on savings and employment
- Entertaining as well as informative
- Entertaining in a detailed topic; excellent speaker
- Enthusiasm (2)
- Enthusiasm and knowledge of economy
- Excellent recaps of past tying into future
- Excellent speaker – very, very knowledgeable
- Explained things well
- Explanation of housing market and future outlook in commercial real estate market. Savings trend
- Factual, data driven
- Fed input on thoughts on future policy
- Fed response options
- Fed’s perspective on infl/int rates/GDP expectations, etc.
- Fed’s perspective on U.S. Economy
- Focused on key issues
- Forward looking information
- Frank & matter of fact
- Frankness
- From the Federal Reserve
- Future outlook
- Good at keeping complicated topic understandable
- Good basic info
- Good content (2)
- Good examples and explanations
- Good explanation of Fed moves during crisis and background from prior recessions
- Good graphics and explanations (2)
- Good historical perspective – good slides
- Good insights into what the fed thinks
- Good overall information of the economy
- Good overview of economy (2)
- Good presenter (2)
- Good presenter, good educator – Well Done!
- Good presenter, not dry
- Good relaxed presentation style
- Good sense of humor
- Good speaker – Knowledgeable
- Good summary of information
- Good, basic – no nonsense presentation
- Graphs
- Graphs really help in interpreting the data. He has a good sense of humor.
- Great
- Great info, well presented, more animated than most Fed/Economy presentation
- Great information
- Great public speaker with great information
- Great speaker

- Great statistics and historical comparison
- Hand outs – Graphs – History perspective
- He had wonderful charts with great stats mixed in a little humor
- He made it interesting and injected humor
- He provided insight to the economic crises not heard previously
- He was very clear in his presentation. I like his historical perspective.
- He's a good teacher – appreciated use of metaphor to understand dynamics at work vs. just the facts involved
- His ability to give the big picture in understandable language
- His clear analogies and ability to translate complex macro economy
- His explanation of why the Fed was created
- His presentation was clear and easy to follow
- His qualifications and authority to speak
- His wealth of knowledge
- Historical and big picture perspective
- Historical perspective
- History provided perspective for today offered ideas for solutions
- Hit key topics – kept it simple and easy to understand
- Humor
- Humor and attention to the timeline allotted
- I could hear him
- I liked where he talked about outlook and gave historical perspective
- I think the historical perspectives and beneficial to understanding the current environment and future potential economic actions/reactions
- Info on housing
- Informal – Good charts – Q & A was very important
- Information about how Fed affects economic policy
- Informative
- Interesting information on the status of the economy
- Interesting perspective
- Interesting take on some common issues
- Interesting to hear about fed interaction with the economy
- Interesting topic – Good delivery
- It was a non-political approach to a subject that is very political and will be controversial for years to come
- It was very good that this was the first presentation. Very informative. Interesting to hear from the fed's view
- Kept it interesting and upbeat
- Kept it high level with adequate info
- Kept my attention
- Kept the presentation lively and moving
- Knowledgeable
- Knowledgeable about topic and presented in an understandable way
- Mismatch in career skills – Debt (mortgage vs. equity) – Subprime mortgages been around for a long time – Status of housing/credit industry – Savings rate
- Nice to hear direct from Fed Reserve
- Nice visual
- Objectives and open to criticism
- Organized, moved along, kept to the script
- Outlook
- Pace, AV Materials
- Perspectives
- Pertinent info
- Practical (2)
- Presentation flowed well and talked about economy in an understandable way. Gave a great perspective.
- Presented his material well, informative and appropriate for the times
- Provide historical perspectives
- Provided accurate picture of what Fed has done and what they haven't done as part of this economic turmoil
- Provided new perspectives from Fed. Reserves roll
- Recent Summary of economic results and expected future
- Relevant information – high level update of economy and specific sectors
- Relevant information, easy to digest and interpret. A little on the eye-opening side.
- Relevant material from his field to economy
- Scary!
- Sense of humor, made econ interesting
- Showed expertise in subject matter – Information was timely – Effective speaker

- Simplified and understandable
- Spoke in a way that was understandable – can tell he was a teacher
- Straight forward presentation without lots of jargon
- Straight forward, filled with informative statistics, etc.
- Teaching style
- Best explanation of the economy and what happened in 2008 I have heard
- Charts and graphs were excellent
- Data behind the story and historical significance of current times
- Data he discussed
- Detail and explanation of the economic charts/graphs and his concerns (and fundamental reasons why) of our economy
- Experiential knowledge he brings to bear
- Fed's opinion on the market
- Fed's perspective is always important even though the info itself failed to assuage a lot of doubts in the minds of the audience
- Perspective of how Fed action has impacted our economy
- Review of the financial system
- Update on the economy. Very good insight on where we may be going.
- Various graphs used in his presentation
- This presentation was a good history lesson to summarize a lot of what we already know – Thank You
- Timely, behind the scenes update
- Touched on many genuine points. Didn't go too deep on anything.
- Trending explanations and what consumers can do
- Tried to present very bad mess as a positive
- Understandable (2)
- Very "real time" – good pertinent info
- Very candid, good slides
- Very clear, concise & interesting
- Very clear, easy to follow, yet intermediate topics – strong presenter
- Very easy to understand
- Very effective pace. Background on Fed thinking was informative. Defense of Fed actions was illuminating.
- Very enjoyable presentation
- Very good speaker
- Very important knowledge – very useful. Charts were good.
- Very informative – lot of good information
- Very knowledgeable
- Very nice presentation
- Very personable, Easy to listen to, Very timely topic
- Very relevant to current situation
- Very timely info

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

- A "guess" (educated) about interest rates rise to what and when
- A few less graphs, a few too many
- Based on outline Christopher believed – I think – presentation could improve with insights about planning for clients. What are ideas on forward thinking opportunities
- Color handout of presentation on disk or on-line access to presentation
- Color handouts (3)
- Discuss the change in Fed policy from exit strategies to further stimulus
- Don't be so cavalier about debt to GDP and the falling dollar
- Don't present information that the vast majority of planners know
- Don't talk about the Fed like it is the US Treasury Department!
- Excellent approach
- Expand to world or global economy where possible
- Give him 2 hours and he could go slower. Why would he not get 2 hours? Important topic!
- Give us something that impacts our meeting with clients
- Go Bemidji
- Good Job
- Good, Thank You
- Graphs difficult to read in black and white
- Great job
- Guy that introduced him – did a bad job and was too far away from the microphone

- Hard to see slide from where I sat (in front of speaker)
- Hard, I know... But larger data on power points to aid viewers from a distance
- Have slides up to date – some slides were missing, end ones
- He contradicted himself a few times
- He did a great job!
- He needed a pointer for some of the charts – Q & A use of microphones S/B required
- How does the aging of population change in demographics affect things
- How we compare in our strategy vs. Japan
- I liked it overall, very good report of what the fed did and why
- I would like him to give out hints at how he became such an effective presenter
- I would like more concentration, looking forward not so much on what already occurred – answered lots in Q&A
- Info was good, but didn't learn anything (generally) I didn't already know. Would like to have more time spent on fed options going forward and what affect they may have
- Interesting comment on how other nations will invest in US Government even in our economy. Want Dr. Waller to comment on that was then, this is now, but in future is US doesn't continue to be world power – this will change.
- Keep it like he's doing it now
- Keep up, great work!
- Less on history and more on what happens next
- Little about Freddie Mac/Freddie Mae and federal government contribution to financial crisis
- Make more advanced
- More detail in solutions. We get most exposure to current statistics – very little in the thinking
- More detail on sections in the economy and comments on middle class erosion
- More on direction going forward
- More predictions
- N/A, None, Nothing (29)
- Need more time, allot 2 hours
- Nothing specific, Good presentation
- Nothing, very great picture of econ, great understanding
- Perhaps, more focus on 2011 – future?
- Presentation materials are black/white but graphics are color, make it difficult to follow
- Presentation was update at last minute and I would have like to have the correct slides
- Slides were a little hard to see/understand
- Slides/book had no color to differentiate the information
- So good, more time!
- Spend more time on future vs past
- Started a little slow and basic
- The slides enclosed did not match the speakers – Long Run Exit Strategy missing
- Tie information to actionable issues facing planners and clients today, less theory – more practical
- Vary colors on charts so B & W charts sufficient
- What can FPA members try to do to improve the economy or what can we do with this information
- Would like insights to his guess on where the economy is going
- Would like to have more on projections – future thoughts

Ross Levin – Retirement Planning in an Adaptive World

Rating 3.43 out of 4.0	4	3	2	1
Tuesday • 412 evaluations				
Program content 3.35	189	178	37	4
Presentation 3.43	213	172	29	2
Learning objectives met?	186	190	40	5
Materials accurate?	198	172	31	3
Handouts/av satisfactory?	188	172	34	5
Effective presenter? 3.51	237	140	25	2
Appropriate time allocated?	189	167	44	10
Facilities/tech equip appropriate?	199	179	18	2
Presentation was:	Basic: 57 Intermediate: 281 Advanced: 48			

How often would you like to hear Ross speak?	Next Year: 106 Every Few Years: 258 Once is Enough: 30
How often would you like an update on this topic?	Next Year: 126 Every Few Years: 210 Once is Enough: 37
Wants additional information:	Betty Anderson, Phil Barnhill, Dana Basballe, Sharon Bloodworth, Charles Blossom, Colleen Hartmon Bollom, Patrick Boria, Gerald Brennan, Steven Bullert, Ryan Carruth, Leo Carton, Trever Christian, Theodore Contag, David Cook, David Daline, Lynn Daly, James Delamater, Perry Diede, Tyler Engbrecht, John Fox, Gary Gallagher, Susan Gherity, Joseph Gribben, Joseph Grochowski, Stephen Hampton, Scot Hanson, Darin Hargreaves, Steven Heimermann, Heidi Helmeke, Lori Hoefener, Jason Kley, Michael Kobs, Kenneth Kramer, Margaret Kruse, Elissa Larson, Michael Lauer, Paul Light, Brian MacDonald, Lucretia Mattson, Jennifer McCool, James Mertz, Joseph Miller, C. Buzz Moen, Chris Mongeon, Timothy Munkeby, Royce Nies, John Oberg, Gary Oliver, Matthew Osborne, Heather Patrek, Dana Pollard, Thomas Ratelle, Mark Rekow, Michael Ricci, Timothy Riley, William Rothschild, Ronald Rydell, Lauri Salverdam James Sanders, Channing Schmidt, Jeremy Schmidt, John Schwalbach, Benjamin Setterlund, Laura Seymour, Ryan Shannon, Michael Sipe, Greg Snider, Steven Storkan, Andrew Tate, William Toops, Cynthia Turkington, Hilary Van de Streek, Charles Vomacka, Ronald Wall, Damian Winther, William Wixon, Joshua Wolberg, David Zack

1) What did you like most about the presentation?

- "Quotes" and metaphors
- A different look at our business. Always good to do.
- A good outlook and ideas on the emotional aspects of investing and client interaction
- Able to talk on high level yet give examples
- All of it – Well done – Insightful – Useful
- Anecdotes
- Anecdotes and willingness to show new thinking and approaches used by his firm.
- Applicable content
- Appreciated his sharing a picture of the performance review, portfolio review and current asset allocation
- Behavioral errors
- Behavioral finance (2)
- Behavioral finance – Good stuff
- Behavioral finance talk/practical client conversation techniques
- Behavioral finance topic is great!
- Behavioral science info
- Behavioral, real stories
- Bringing in the behavioral finance compound
- Candid assessment of his own practice
- Client examples
- Compassion
- Comprehensive approach
- Considered real situations
- Continue the great work
- Depth of behavioral finance
- Does a great job of communication/knowledge/experience
- Down to earth and informative
- Earthly experience – Peer to peer – Great
- Easy to listen to
- Engaging & well read
- Enjoyed the behavioral finance topic
- Enthusiasm
- Everything
- Everything – Thought provoking
- Examples – Analogies
- Examples all could relate to
- Examples of his client experiences
- Excellent as always
- Experience & sincerity – Personal stories as examples
- Good

- Good behavioral examples
- Good examples
- Good injection of humor
- Good mix of the literature with his personal touch
- Good philosophical topic as well as good examples
- Good presentation
- Good presenter
- Good presenter and diverse perspectives were presented – Great overview
- Good speaker, organized, stories are always helpful
- Good speaking style
- Good stories to support talk – Got better as it went
- Good topic, relevant & important
- Great attitude
- Great examples/stories
- Great insight and view into behavioral finance and how it affects the planning profession
- Great job!
- Great personality
- Great presentation (2)
- Great presentation and delivery
- Great sense of humor – Well spoken – Good references
- Great stories
- Great stuff – Just too much to remember
- Great takeaways – Humor – Real-life examples – evoked emotions – Positivity
- Great use of humor
- Great, interesting and relevant topics
- Group participation – Good speaker – Nice to have successful planner share with everyone else – Makes you think
- He brings on intelligent. Well thought out approach but has practical applications
- He did a great job of making the audience feel comfortable. Loved his illustrations.
- He forgot to talk about retirement planning
- He had some great quotes and general ideas with examples
- He is a good presenter, good use of humor and examples
- He is a great speaker
- He is fabulous
- He kept it interesting – lots of examples, stories, humor, good use of the slides, down to earth style of presenting
- He meandered, could close better in 1 hour. Some was very good, too much filler
- He presented a very broad perspective in helping clients meet their financial goals – good approval
- He speaks equally and profoundly to both the head and introspection makes his insight powerful. The soul.
- He's a good speaker
- He's one of us. Real life examples of client interaction
- His candor, his ability to connect, how we can learn from experiences, influences, behavioral finance, tying in the emotional
- His experience
- His integration of behavioral finance into managing his practices
- His philosophy – things are bad but they'll get better – message of hope and action. "This important time" – opportunity to make a difference in our clients "lives"
- His sense of humor
- His tips on addressing human behavior
- Honesty and openness of dealing with historical challenges. Using client and real life examples. His sharing of best practices and ideas for improving how we help and work with investments,
- How much he gives back to our community
- How to work with clients from an emotional side, coming to them from their perspective
- Humor – Organization – examples
- Humorous at times, very relative, level to audience
- I don't get a chance to listen to someone with his expertise and knowledge often. The behavioral finance is often overlooked by product discussion. Very insightful presentation. Great slides
- I feel like having more 50 minute presentations are more valuable to me than a long one like this
- I like soft content of behavioral finance
- I like the psychology of money
- Insight
- Insight on dealing with emotional behavior
- Insights shared from his own business practice

- Insights to how to cope with market changes and behavioral finance. Great stories and examples
- Integration of various sources of information – Wisdom
- Intellectual perspective
- Interesting stuff
- It is interesting to hear a peer's thoughts on the way they run their business
- It's always good to hear from our peers
- Jokes
- Kept it lively – interesting
- Like his philosophies – had great insight
- Liked video and other “word memory” illustrations
- Lively speaker – executive examples/stories
- Made me really think (2)
- Monkey – Overview of common factors in retirement planning – Last 10 minutes
- Most of it “psychology for the investor
- Nice job
- Nicely done – keeps our complex world simple
- Other priorities than just returns
- Outstanding
- Personal experiences, entertainment with academic research
- Philosophical
- Practical – considers client emotional needs and suggests how to enhance & relate
- Practical and easily applied to current business
- Provided a lot of examples (real life)
- Provided valuable insights into clients thought patterns and gave examples
- Psychological impacts were good
- Real life examples
- Really enjoyed taking/learning about how to better talk to clients about what I can control and what I can't
- Reference the other material – resources, discussion was not just read from slides
- Relating back to own clients
- Relevant practice experience
- Ross – Great as usual – please remember this
- Ross is integrity and it comes thru
- Ross was entertaining and informative
- Seeing how you communicate without concepts to clients
- Seems like a very likable guy
- Simple – relating stories to concepts
- Some good practical info that provoked my ideas on client interactions
- Stories to get audience engaged
- Stories, activities, participation
- Straight forward influence – examples
- Talked about the clients not about the numbers (investment, taxes, etc.)
- The conceptual discussion of behavior invoking
- The focus on the clients emotions and real behavior
- The psychology of client relationships
- The simple client story, 4 spending rates, i.e. 0, 25, 50, etc.
- Things are too bad to be true
- Thoughtfulness – Wisdom – Insight – Humility – Humor – Self depreciation
- Topical
- Understand bias
- Unique
- Use of psychology – Values
- Very good, insightful
- Very Good, Thanks!
- Very honest, very humble yet powerful
- Very nice presentation
- Very personal – Funny – Investing
- Very well done
- Wonderful to hear about the learning and intellectual stretching that goes on at accredited

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

- “Common errors” section could be shorter – More concise
- 5 minutes break in the middle of presentation

- A bit “academic” would have liked a few more real-life cases
- A bit too broad in scope on content
- A little long/shorten it up/shorter/shorten presentation (11)
- Behavioral finance was interesting but I would have preferred more time on the retirement planning approach
- Check your math on the last performance slide
- Color handouts – Bibliography for various quotes
- Common error list – little too long – Could condense down
- Don’t say that he has not given his speech before or even often – Just run with it.
- Good information too slow of pace
- Good use of crown survey question. More free long precaution might be useful.
- How to help lower net worth clients
- I felt his presentation was more behavioral finance than retirement planning so my expectations were not met
- I liked the information on client review material and reporting – More on this including tools available would be encouraged
- I would have like a little more detail on his own practices regarding retirement income planning
- It was a lot to cover
- It’s a lot to absorb – small group conversation might be more enlightening
- Keep doing it the way you are doing it
- Keep the same style
- Less book quotes
- Less on a slide so more room to write notes
- Less quotes from books
- List of favorite and influential books
- Long start, much better once slides progressed
- Make emotional and philosophical aspects of investing a separate talk from technical portfolio strategies – each deserve their own time. Nice presentation – Thanks!
- Make the slides that are unreadable, readable. I did not have the big book and could not reference the slides
- Maybe limit how many theories he talks about
- More details on his business practice and the process he takes his clients through
- More hard stuff at the start
- More practical and less academic
- None, N/A, Nothing (13)
- Not enough clarity on technical info
- Nothing specific – Great presentation!
- Out of touch with audience, it seemed
- Provide a list of resources – you mentioned many books and authors in your talk
- Provide bibliography of books/authors he likes and uses
- Shorten it by 1 hour or give a break after 1 hour
- Slide prints way too small – Couldn’t read, even with glasses on
- Slides with reference books listed – Names/Authors of books – Professionals references as well
- Step away from podium more
- There was a loose thread that tied all the information together – tightening segues would vastly improve the presentation. Nevertheless, very enjoyable. Thank You
- Title was misleading
- Too broad
- Too much on numerous subjects. It seemed like it bounced around too much. Take a few of these concepts and go deeper. Hard to walk away feeling I own anything of what was covered.
- Too much philosophical
- Too much psych reference, albeit I understand the importance. I’m surprised to see the Accredited management styles. Less
- Too much psychological analysis, but not by much
- Too much theory – more time needed on client experience
- Too preachy – too much time quoting others – old jokes
- Used 20 minutes to intro his talk – too long – should have been titled “Using Behavior Science in Retirement Planning – too long without standup break
- Would like a short written definition of the “common effects” could not write fast enough
- Would like to see Ross’s recommended reading list!
- You need a quick break somewhere in between a lot of people had to get up.

Vlad Milev – Global Investments / Foreign Markets

Rating 3.00 out of 4.0	4	3	2	1
Tuesday • 405 evaluations				
Program content 2.98	64	197	65	3
Presentation 2.93	66	189	84	3
Learning objectives met?	79	182	70	6
Materials accurate?	97	163	46	5
Handouts/av satisfactory?	89	160	65	1
Effective presenter? 3.10	86	183	52	1
Appropriate time allocated?	103	182	48	3
Facilities/tech equip appropriate?	104	164	35	3
Presentation was:	Basic: 65 Intermediate: 255 Advanced: 70			
How often would you like to hear Vlad speak?	Next Year: 49 Every Few Years: 223 Once is Enough: 123			
How often would you like an update on this topic?	Next Year: 128 Every Few Years: 181 Once is Enough: 59			
Wants additional information:	Kristi Andersen, David Baldwin, Dana Basballe, Nicholas Beissel, Charles Blossom, Patrick Boria, Gerald Brennan, Gregory Brown, Charles Buck, Alexander Bush, Scott Bye, Leo Carton, Trevor Christian, David Cook, Lynn Daly, Scott Foreman, John Fox, Stephen Hampton, Travis Hansberger, James Householder, Gerald Jordahl, Jason Kley, Laura Kuntz, Debra Kuper, Elissa Larson, John Layton, Paul Light, James Mertz, Joseph Miller, C. Buzz Moen, Troy Noor, Scott Oeth, James O'Halloran, Gary Oliver, Matthew Osborne, Jason Plank, William Rothschild, Ronald Rydell, Lauri Salverda, Kent Schutte, Ryan Shannon, Greg Snider, Katherine Stienessen, Fredrick Sundquist, Dean Tesch, Ronald Wall, Joshua Wolberg			

1) What did you like most about the presentation?

- "Big Mac Index" illustration in currency relationships
- 3 countries to focus on
- A fine presentation on a subject we need to hear about!
- Amazing presentation – relevant topic
- An economist with a sense of humor
- Appears to be knowledgeable in subject matter
- Background in something I do not follow as closely. Interesting
- Background info on countries
- Brazil/Russia/South Korea details
- Clarity – Step by step approach
- Clear explanation for his topic area
- Clear speaker – good pacing
- Comparison of performance of the like global countries
- Competent/Effective
- Consistent framework
- Country breakout
- Detail and knowledge of emerging markets
- Discussion on emerging markets
- Easy to listen to – Good pace
- Emerging markets great breakdown
- Energy & experience – Personal examples
- Energy and good presenter
- Enjoyed the country political stories
- Examples of using his framework for evaluation – nice job of addressing the question
- Excellent with a great sense of humor
- Expert level informant
- Focus on emerging markets – Gave some conclusions
- Foreign outlook
- Foreign view – Experience
- Framework was good
- Global investments/markets foreign policies are very topical right now

- Good analysis on how to factor in values for foreign markets
- Good basic knowledge about countries
- Good information about specific countries
- Good job (2)
- Good overview
- Good perspective and knowledge of foreign markets
- Good presentation skills
- Good to hear perspectives from non-US players.
- Good use of humor injected into presentation
- Good way to start summarized and show a couple examples – Good cadence in presenting – Good attempt to involve audience
- Good, basic approach – seemed very knowledgeable in specified area
- Great job!
- Great speaker – Clear thoughts – Good presentation
- Great to get an analysis on foreign countries
- Hard to some of presentations
- He is very knowledgeable about the subject matter and has very good presenter skills
- He knew his stuff
- He was knowledgeable about his topic
- He was okay – Good presenter with weak presentation
- He was very clear and tied in some humor. I enjoyed his presentation
- Helpful to hear about some other key players – South Korea – etc.
- High level overview – Framework with practical application/story
- His accent adds credibility
- His coverage on individual countries
- His knowledge and expertise
- His nationality – solid knowledge
- His simplification of complex topics
- His specific country analysis and accent
- His take on asset allocations
- His world view was interesting
- How he evaluates countries top down and what to look for
- Humorous comments
- I am hard of hearing – missed most of talk – Accent problem – talk a little slower
- I don not focus on specific country allocations but the broader perspective on emerging markets was useful
- I liked his presentation, he kept it light and interesting which was good for me as I'm not too interested in the topic. Very good Q & A session. Thank You!
- I'm not a money manager – too long – sorry
- Information on specific countries and groupings BRIC/BRICI
- Informative
- Insight into complex
- Interesting (2)
- Interesting but no comment
- Interesting data on the foreign countries – i.e. credit ratings, GDP, deflation, etc.
- Interesting global outlook
- Interesting info and insights. I engage fund managers to make country by country decisions
- Interesting perspective, good process
- Interesting, good presenter – Interesting slides
- International perspective, experience, framework, for evaluating foreign funds
- Intl and emerging markets are timely topic
- It was great to hear his thoughts on developing markets
- Knowledge about the various countries
- Knowledge experience
- Knowledge was very high. Nice to hear how emerging markets are researched.
- Knows his material – credible
- Like the clear process for measuring international and emerging market investments. Very thorough
- Like the way he laid out history, framework and examples
- Make focus on how to utilize
- Needs brighter overheads
- Nice discussion of top down method
- Nice graphics – Interesting
- Nice job
- Nice summary of his Top Down method of analysis

- None (2)
- Not fair to follow two very good speakers I was lulled into complacency
- Not so lively or interesting
- Obviously knows his "stuff!"
- Obviously very knowledgeable and did portray value of global investments and format of choosing answers to questions were good
- Personal insight
- Personal/Business insight shared. He displays great knowledge and process
- Provided a good framework for evaluating/understanding risk of emerging/emerged markets. Funny
- Q & A
- Recurring topical subject
- Relevant topic – timely information – well organized
- Somewhat hard to understand his accent
- The four slides with disparities was useful
- The slide graphics!
- The updates about emerging markets – Very relevant topic
- This didn't apply to my business at all. He was so specific upon which country
- This should be a break out topic – I would like more break out presentations
- Too technical for my practice. Information good, but not relevant for my practice.
- Topic was something outside to norm and very interesting
- Very comfortable speaker
- Very confident of the subject matter
- Very knowledgeable on the topic
- Very knowledgeable sounds like he has real nature – liked how he can be specific on countries BRICKS
- View of non-US Markets and rationale for what's happening and why
- Would like more time – breakout and start from beginning

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

- A bit dry
- A more historical perspective and a relative economics of the countries in relation to the US
- A small thing it is difficult to write notes on the power point slides when the background is dark.
- Appropriate for a research analyst but not me – I'm a planner and outsource investment services
- Back office of his company should have power point slides with lighter backgrounds. Makes it easier to take notes.
- Bibliography of selected readings
- Change background color of handout to provide white space for notes
- Connect with the audience more
- Could be a little more broad
- Could have been slightly shorter – slightly more detail in hand outs would have been nice – Have a lighter color backdrop of power point handouts to take notes
- Dark background on slides do not help with note taking. Change to white. Show more details on slides.
- Dark background on slides for handout makes note taking difficult
- Dark background on slides in book hard to take notes on – lighten up!
- Did not give real insights as to results of approach – need more – examples did not add
- Difficult to determine his manage and conclusion
- Don't merely report what is – Focus on "so what"
- Expand topic for better perspective
- From a positive position, tough to know how to directly apply to how we manage money. Seemed very specific
- General themes would be better than talking about 3 countries prospects
- Great detail maybe adding some recommendations educating clients of this subject – to pass the knowledge onto them
- Have a microphone of questions – References on where to find more information
- He'll improve with more experience
- How does it fit in my financial planning practice? How much in portfolio?
- I don't believe the presentation was a good match for the majority of the audience
- I think this presentation would be better as a break out session for those that work intricately in developing their own portfolios
- Incorporate humor, improve slides – larger, white/bright-colored background
- Interesting explanation on each country
- It was a little dry – maybe have more anecdotal info
- Leave room on slides for notes – materials not that useful after the session. Perhaps focus more in intro about the case for global investing – for which clients is this appropriate?

- Less technical for audience of financial planners most of who use mutual funds
- Loved the use of framework on specific countries. Would be helpful to know time frame used for 2010 numbers are they turn 3Q?
- Make slide background white in the handouts so that we have more room to write notes
- More about allocations rather than stock valuations. I think this topic could have been tailored better for a financial planning audience. Good presenter, but maybe needed a different perspective.
- More actionable information so I can apply the information presented
- More bullet points in the presentation would help
- More practice management
- More specific about equity and bond outlook
- None (7)
- Not as relevant as I'd hoped it'd be
- Not so concerned about "selecting: (stocks, etc.) or I am in seeking trends
- Nothing specific –A good presentation overall
- Overview of what topic is for those who do not work in details of portfolio management
- Recommend or talk about individual companies
- Relate content better to financial planning
- Relate investing in foreign markets closer to individual financial planning. Why make foreign/emerging in portfolio, etc. He's too deep into how to hook countries and what to look for. A little too deep for me. Bad presentation, just not related closely enough to personal financial planning.
- Relate this to practical uses for our field – not traders
- Somewhat dry... help tie more to impact on USA.
- Speak louder
- Talk about demographics, consumer spending, trade and currency issues
- Talk with pauses – so we can digest his thought
- The content was too novice for me, an asset allocation – I hire managers to do country and security selection. This was not useful for my practice.
- The dark slides in the handout were hard to make notes on
- This seemed like the institutional discussion
- Too general, no basis for evaluation examples or "recommendations' per se or why to be overweight or underweight in a country. Let alone a specific company. Needs to relate evaluation to specific investment choices we can present to clients for global investing.
- Too little data "valuations low here, high above" these general opinions should be backed up by data on the countries of which he is speaking. I heard his opinions but learned little
- Too much detail – Dry info
- Too short, but not with questions
- Topic is more for investment analysts than financial planners
- What does he like the best, why?
- With no disrespect to the speaker, I didn't find this presentation all that practical to my job as a CFP. Would prefer the direction to be towards choosing global mutual funds – not evaluation emerging market countries.
- Would have been appropriate for a breakout session
- Would have like more specific details for equities and debt included in presentation – delving in more detail. Too high level
- Would like to go more in depth on global economics and investments
- Would love to hear about other parts of the world

Keith Loveland – Code of Ethics

Rating 3.60 out of 4.0	4	3	2	1
Tuesday • 238 evaluations				
Program content 3.54	137	89	10	0
Presentation 3.56	137	81	10	0
Learning objectives met?	133	81	10	0
Materials accurate?	133	83	6	1
Handouts/av satisfactory?	120	93	10	2
Effective presenter? 3.69	161	57	3	2
Appropriate time allocated?	128	88	7	1
Facilities/tech equip appropriate?	126	86	10	0
Presentation was:	Basic: 36 Intermediate: 157 Advanced: 32			

How often would you like to have an ethics presentation?	Next Year: 151 Every Few Years: 61 Once is Enough: 6
Wants additional information:	Gerald Brennan, Matthew Cano, Trever Christian, David Cook, David Daline, Lynn Daly, Webb Davis, Ford Droegemueller, Tyler Engbrecht, Brian Farley, Noelle Follen, Gary Gallagher, Dennis Gianoli, Fang Huang, Jason Kley, Laura Kuntz, Jacqueline Larson, Patrick Lundy, Lucretia Mattson, Jennifer McCool, James Mertz, William Nelson, James O'Halloran, Jason Plank, Timothy Riley, William Rothschild, James Sanders, Ryan Shannon, Fredrick Sundquist, William Toops, Charles Vomacka, Rosemary Ward, Nate Wenner, William Wixon

1) What did you like most about the presentation?

- All good
- Always new learning!
- Art look
- Artwork – Humor
- Case examples (3)
- Case studies – Good; Presenter – Interesting – Good sense of humor for attorney
- Case studies (6)
- Clarity and knowledge of presenter
- Colorful delivery
- Covered the CE requirement for CFP
- Enjoy interactivity about the session – encourages learning
- Enjoyed working through the case studies. Great job of adding humor to a dry topic
- Entertaining speaker – Great content
- Funny and kept it moving
- Good case studies – Good overview
- Good case studies with audience participation
- Good discussion around our table
- Good job (2)
- Good review
- Got me thinking
- Great dry sense of humor
- Great job! (2)
- Group setting to get engaged
- He is awesome in an Andy Griffin kind of way!
- He was interesting and engaging – good sense of humor. (Real life examples do apply to my “average” investor)
- Hit the high points
- Humor
- Humor in presentation; participation with others on case studies
- Humor, entertaining, thought provoking
- I hate case studies and discussion but this was a good format for the subject
- Interaction between instructor and audience – Keith’s sense of humor
- Interaction with audience
- Interactions
- Interactive experience
- Interactive, great engagement
- It was done with a sense of humor. That always makes it more interesting
- Keith always makes a dry topic interesting
- Keith does it well in the form of cases. The case creates excellent discussion!
- Keith is a good guy
- Keith is a great presenter
- Keith is excellent – very nice to find ethics case engaging!
- Keith makes ethics a pleasant experience
- Keith was excellent. Has a great method of teaching ethics. The case study discussion was thought provoking
- Keith’s presentation style is excellent! Very entertaining!
- Make you think about stuff you see often, in a deeper way
- Makes a dry subject entertaining
- Mr. Loveland makes his topic interesting
- Nice job – Kept it interesting
- Nice presentation style
- On a roll – Mr. Loveland’s humor – Today

- Participation
- Presentation style made topic fun!
- Real life examples to make you consider what your ethical duties are
- Relevance to day to day activities
- Thanks Keith
- The great examples that Keith gave us to work on
- The group interaction and brainstorming
- The humor (Wisdom, of course)
- The presenter
- The seven case studies were very good but it would be much more interesting/exciting if the cases were real cases having been settled in court or arbitration
- This guy is odd, he thinks of things I couldn't even imagine
- This was a helpful format – including table discussion and participation
- Very nice case studies
- Very well done
- Well done
- Working with a team with those around us

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

- Be available for both 1 & 2 hours, so if only need 1 credit, don't have to stay for both
- Change pictures, content and cases, same stuff as last year!
- Cite recent law suits & regulatory actions: summarize by the of claims brought against advisors
- Couldn't relate to the cases very well – make them a little more wide-ranging in applicability
- Have more questions – ask the planners how they would handle other cases
- How did he come up with the client names?!
- It was the exact same as last year
- Might be time for a new or different presentation
- More art work
- More case designs
- Names of case examples are in bad taste “Bouncing Bonita” “Aggressive Abiku” c'mon!
- Need someone new for ethics presenter
- New case studies next year
- Speaking too loudly with portable microphone... please adjust volume or physical placement
- The handouts were needed for case studies however I “went green” and didn't print which made it difficult to follow
- Use a different course/materials – more true was stories – very interesting
- Use current economic environment in case studies

Mick Endersbe – Values-Based College Planning

Rating 3.71 out of 4.0		4	3	2	1
Tuesday • 65 attendees • 60 evaluations					
Program content	3.72	43	17	0	0
Presentation	3.65	40	19	1	0
Learning objectives met?		43	17	1	0
Materials accurate?		42	17	0	0
Handouts/av satisfactory?		41	17	1	0
Effective presenter?	3.75	44	12	1	0
Appropriate time allocated?		35	18	4	2
Facilities/tech equip appropriate?		41	19	2	3
Presentation was:		Basic: 10 Intermediate: 40 Advanced: 7			
How often would you like to hear Mick speak?		Next Year: 28 Every Few Years: 28 Once is Enough: 2			
How often would you like an update on this topic?		Next Year: 33 Every Few Years: 24 Once is Enough: 1			
Wants additional information:	Kyle Beatty, Sophia Bera, John Bergstrom, Marilyn Broussard, Alexander Bush, Sharon Calhoun, Darin Hargreaves, Pamela Heimdal, James Householder, D. Alfred Jones, Daniel Katan, Kent Krueger, Eric Munkeby, John Rehl, Peter Rekstad, Lauri Salverda, Nicholas Thunker, Damian Winther				

1) What did you like most about the presentation?

- Awesome!
- Cash flow planning for college
- Excellent! Eye-opening presentation and very good explanation of the material .
- Fact-based, real life experience
- Fresh ideas
- Good cost planning ideas
- Good info
- Good job, good ideas
- Great Info
- High energy , a lot of info,
- His knowledge, very interesting presentation, very realistic
- I learned something new
- In depth, 1.tour 2.lunch Good Job!
- It's planning and not a product
- Packed in a lot of info
- Practical advice/common-sense reality check
- Quick, smart, entertaining and provocative
- Really great stuff! Loved this!
- Thank you for having Mick present
- The updated numbers on public and private schools
- Very practical

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

- Microphone possibly
- Nothing, Excellent!
- Provide a list of all reference web-site on a single slide(ed.gov, ifap,direct plus loans,etc)
- Some 529's also have individual fund options similar to CESA.
- Talk a little slower
- Talked too fast
- The presentation was too fast paced for me. I should have had a base knowledge of college funding.
- Too bad compliance issues are short circuiting your education efforts here.
- Use a microphone/talk slower or louder

John Comer – The Client Review Meeting

Rating 2.98 out of 4.0	4	3	2	1
Tuesday • 54 attendees • 51 evaluations				
Program content 2.94	10	27	13	0
Presentation 2.92	10	27	14	0
Learning objectives met?	10	29	9	1
Materials accurate?	18	24	5	0
Handouts/av satisfactory?	21	22	4	0
Effective presenter? 3.08	16	24	8	2
Appropriate time allocated?	15	29	7	0
Facilities/tech equip appropriate?	19	26	4	2
Presentation was:	Basic: 34 Intermediate: 17 Advanced: 0			
How often would you like to hear John speak?	Next Year: 11 Every Few Years: 23 Once is Enough: 14			
How often would you like an update on this topic?	Next Year: 10 Every Few Years: 21 Once is Enough: 13			
Wants additional information:	Dana Basballe, Charles Blossom, Susan Gherity, Scot Hanson, Kenneth Kramer, Timothy Munkeby, John Oberg, Mark Rekow, Ronald Wall, Joshua Wolberg			

1) What did you like most about the presentation?

- Age and situation- know the particular discussion parts, liked the agendas in the back.
- Clear, helpful. Excellent questions raised

- Confirmed what I like to think I already do.
- Excellent knowledge of formal presentation to extent he made presentation more real
- Good ideas
- Good info overall
- Good job of helping us to value the importance of an agenda in client meetings
- Good tips on meeting content
- Had some useful ideas
- It was good basic common sense info on an important topic
- Liked sample agendas and detailed sub agenda
- Nice job!
- Practical agenda templates
- Sample agendas “vault” idea
- Systemizing agendas
- The fact that he didn't read the slides to us rather expounded on to script.
- Very good presentation
- Very helpful information

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

- Be more interactive, use key points on slides to drive conversation
- Could share some insights on what the overall purpose of a review meeting should be
- I thought the information was too high level
- More real-life examples
- Need bigger room
- Not enough material for time allotted.
- Present examples and/or stay closer to subject matter
- Real world client examples that this process has been utilized maybe an advisor that has gone through this process and their testimony
- Say a little about his business
- Sign outside room should contain speaker name
- To expand beyond the agenda
- Would have preferred more outline tools, framework and specifics

John Leonetti- Helping your client prepare their business for succession planning.

Rating 3.60 out of 4.0	4	3	2	1
Tuesday • 64 attendees • 56 evaluations				
Program content 3.54	32	16	4	0
Presentation 3.57	32	19	2	0
Learning objectives met?	30	17	5	0
Materials accurate?	26	25	1	0
Handouts/av satisfactory?	28	23	1	0
Effective presenter? 3.68	37	15	1	0
Appropriate time allocated?	22	24	4	1
Facilities/tech equip appropriate?	24	24	4	0
Presentation was:	Basic: 1 Intermediate: 32 Advanced: 16			
How often would you like to hear John speak?	Next Year: 16 Every Few Years: 28 Once is Enough: 7			
How often would you like an update on this topic?	Next Year: 21 Every Few Years: 27 Once is Enough: 3			
Wants additional information:	Paul Block, Leo Carton, John Fox, Danica Goshert, Stephen Hampton, Steven Heimermann, Craig Jergenson, David Laurion, Brian Macho, Tanya Nichols, Scott Oeth, Dennis O'Hearn, Thomas Ratelle, Ronald Rydell, Channing Schmidt, Kent Schutte, Karl Schwartz, Tenielle Shallman, Scott Simpson, Greg Snider, Adam Stern, Cynthia Turkington			

1) What did you like most about the presentation?

- 6 steps – presentation as a process
- Buy out grid

- Excellent
- Excellent presenter. Organized. Followed script
- Expertise
- Good info (5)
- Good update
- I am glad his slides are available
- Most valuable information for financial planners
- The 4 types of owners paired with transfer options
- Timely
- Unique, very knowledgeable
- Well prepared, knew his stuff well
- Well-designed system & presentation

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

- 2 day workshop
- Allow all attendees to purchase books at a discount at FPA session
- Be more down to earth
- Case studies
- Have John back for a longer presentation
- He skipped over so many points
- It seems like he could have had more content – had never said “it’s in our program”
- More illustrations
- Need more time (4)
- Scale back a bit on the commercial for Pinnacle training program.
- Selling his program- give us the info not teasing us about it
- Set up time for personal follow thru

James Czechowicz – Ten Frequently Asked Questions about Social Security

Rating 3.62 out of 4.0	4	3	2	1
Tuesday • 139 attendees • 136 evaluations				
Program content 3.54	80	46	8	0
Presentation 3.59	83	44	5	0
Learning objectives met?	82	43	8	0
Materials accurate?	91	42	0	0
Handouts/av satisfactory?	84	47	2	0
Effective presenter? 3.72	98	36	1	0
Appropriate time allocated?	77	50	7	2
Facilities/tech equip appropriate?	76	51	3	3
Presentation was:	Basic: 56 Intermediate: 65 Advanced: 5			
How often would you like to hear James speak?	Next Year: 47 Every Few Years: 69 Once is Enough: 12			
How often would you like an update on this topic?	Next Year: 53 Every Few Years: 69 Once is Enough: 4			
Wants additional information:	Kristi Andersen, Dana Basballe, Paul Basballe, John Bergstrom, Anthony Brinda, Steven Bullert, Alexander Bush, Sharon Calhoun, Brian Carlson, Leo Carton, Perry Diede, Scott Foreman, Susan Gherity, Scot Hanson, Gerald Knutson, Kenneth Kramer, Kent Krueger, David Laurion, Joseph Miller, Norman Mitchell, Timothy Munkeby, Scott Oeth, Thomas Ratelle, Mark Rekow, Peter Rekstad, Ronald Rydell, Lauri Salverda, Greg Snider, Cynthia Turkington, Ronald Wall, Damian Winther			

1) What did you like most about the presentation?

- Clear and Concise
- Confirmed what I thought I already knew.
- Details of the program
- Discussion about spousal benefits
- Everything
- Examples were excellent

- Excellent summary; gave good ideas for clients
- Glad he stayed away from politics- just factual
- Good & relevant information. This topic should be a regular at the symposium
- Good Info, clear and easy to understand
- Good job
- Great delivery of dry topics
- Great Info (4)
- Great overview of a very complex subject
- Great overview- very knowledgeable
- Great presenter & interesting content
- Great summary
- Helpful
- Humor
- Kept SS light
- Made it simple /used examples
- Nice style
- Outstanding overview & insight
- Really good
- Refresher
- Straightforward
- Thank you! Great presentation!
- Thanks for the internet information
- This info is so important. I felt like this could have been a 2hr time block. Jim did a very good job.
- To know that someone from SS is doing education
- Very good at giving answers to most common questions asked by pre retirees
- Very knowledgeable
- Well presented

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

- Clicker didn't work well
- Could get into more sophisticated techniques
- How to integrate with financial planning practice "do over" option
- More examination of each benefit type
- More time for Q & A
- More time/more strategies/more detail
- Perhaps give him more time to discuss strategies for spousal options
- Start and stops SS benefits
- The presentation was too basic for CFPs?
- This requires more time (5)
- Too basic

Mark Lanterman – The Impact of Digital Evidence on Financial Fraud Investigations

Rating 3.94 out of 4.0	4	3	2	1
Tuesday • 21 attendees • 17 evaluations				
Program content 3.82	15	1	1	0
Presentation 4.00	17	0	0	0
Learning objectives met?	13	3	1	0
Materials accurate?	14	3	0	0
Handouts/av satisfactory?	13	4	0	0
Effective presenter? 4.00	17	0	0	0
Appropriate time allocated?	13	4	0	0
Facilities/tech equip appropriate?	13	4	0	0
Presentation was:	Basic: 2 Intermediate: 11 Advanced: 2			
How often would you like to hear Mark speak?	Next Year: 5 Every Few Years: 7 Once is Enough: 2			
How often would you like an update on this topic?	Next Year: 5 Every Few Years: 7 Once is Enough: 1			

Wants additional information:	Kyle Beatty, Matthew Nelson, Dennis O'Hearn, John Rehl
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- 1) What did you like most about the presentation?
 - An extremely entertaining series of cautionary tales about people who didn't get that there is no privacy in the cyber world.
 - Drill holes in your hard drive if you really want to destroy data
 - Very entertaining
 - Now I know how to protect client data
 - Wonderful and timely info on financial fraud on computers
 - Excellent! Please have back next year (2)
 - War stories
 - As technology changes need more knowledgeable practice mgmt. (2)

- 2) What suggestions do you have on how the presentation could be improved?
 - How can I protect my client's data better?
 - Work with us to get CFP credit next year- we'll change title description

Town Hall Meeting – Joe Pitzl, Mike Branham, Janet Stanzak, Ben Wacek

Only 2 evaluations, so not ranked	4	3	2	1
Tuesday • 14 attendees				

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

- 2) What suggestions do you have on how the presentation could be improved?
 - None

Marianne Smythe – Raising the Ethics Challenges for Financial Planners

Rating 3.65 out of 4.0	4	3	2	1
Tuesday • 329 evaluations				
Program content 3.51	176	133	6	4
Presentation 3.67	237	77	11	3
Learning objectives met?	183	112	17	4
Materials accurate?	193	112	8	3
Handouts/av satisfactory?	192	111	12	3
Effective presenter? 3.77	257	53	7	2
Appropriate time allocated?	195	106	15	3
Facilities/tech equip appropriate?	201	106	8	2
Presentation was:	Basic: 82 Intermediate: 184 Advanced: 26			
How often would you like to hear Marianne speak?	Next Year: 162 Every Few Years: 108 Once is Enough: 24			
How often would you like an update on this topic?	Next Year: 174 Every Few Years: 106 Once is Enough: 15			

Wants additional information:	Kurt Baldry, Dana Basballe, Steven Bullert, Ryan Carruth, Leo Carton, Kathy Chen, David Daline, Lynn Daly, Perry Diede, Tyler Engbrecht, Noelle Follen, Gary Gallagher, Susan Gherity, Dennis Gianoli, Justin Gullekson, Scot Hanson, Steven Heimermann, David Heitkamp, Michael Hochstetler, Lori Hoefener, Angela Kiefer, Jason Kley, Debra Kuper, Elissa Larson, Jacqueline Larson, Patrick Lundy, Lucretia Mattson, Jennifer McCool, James Mertz, Joseph Miller, James O'Halloran, Dennis O'Hearn, David Pratt, John Rehl, Mark Rekow, Timothy Riley, William Rothschild, Ronald Rydell, Lauri Salverda, Ryan Shannon, Greg Snider, Elizabeth Stromberg, Fredrick Sundquist, William Toops, Charles Vomacka, Ronald Wall, Nate Wenner, Joshua Wolberg, Erich Zellmer
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1) What did you like most about the presentation?

- All known points were raised.
- Attitude
- Awesome Job! Loved her! (4)
- Best presenter of the day by far! (5)
- Colorful explanation/animated
- Detailed
- Energetic/Enthusiasm (4)
- Engaged the audience (19)
- Entertaining(11)
- Excellent (14)
- Fantastic (2)
- Frank/ to the point (9)
- Fun (4)
- Good energy (7)
- Good legislative update (6)
- Great Speaker (11)
- Great speaker at the end of the day (19)
- Her experience & life story.
- Honesty
- Humor (61)
- Informative (11)
- Insightful
- Interesting style (3)
- New York style (3)
- Personality (3)
- Relevant and timely
- Thank You (4)
- Very enjoyable
- Wonderful

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

- An update would be good, not a recap of all unknowns
- Clean up the language/Less profanity (22)
- Come back and come often
- Conclusion?
- Don't read slides to us
- Don't be too casual about the subject
- Don't try so hard to play to the audience
- I didn't learn a thing
- Keep laughing and having fun
- Less commentary, more facts and advice (5)
- More details
- More time
- Seemed like topics and style were scattered (4)
- The longer she talked the more confused I became- what was her point?

Stuart Bear – Estate Planning 2011 & Beyond

Rating 3.61 out of 4.0	4	3	2	1
Wednesday • 369 evaluations				
Program content 3.49	188	151	15	0
Presentation 3.59	220	122	12	0
Learning objectives met?	207	133	12	0
Materials accurate?	199	129	15	1
Handouts/av satisfactory?	169	144	27	3
Effective presenter? 3.75	266	72	8	0
Appropriate time allocated?	211	127	12	0
Facilities/tech equip appropriate?	202	132	16	0
Presentation was:	Basic: 95 Intermediate: 214 Advanced: 34			
How often would you like to hear Stuart speak?	Next Year: 211 Every Few Years: 213 Once is Enough: 8			
How often would you like an update on this topic?	Next Year: 273 Every Few Years: 51 Once is Enough: 2			
Wants additional information:	David Baldwin, Dana Basballe, Paul Basballe, Sophia Bera, John Bergstrom, Rebecca Botzet, Gregory Brown, Steven Bullert, Alexander Bush, Sharon Calhoun, Ryan Carruth, Leo Carton, Trever Christian, David Cook, James Delamater, Perry Diede, Paula Doroff, Stephen Fischer, Scott Foreman, John Fox, Gary Gallagher, Danica Goshert, Joseph Gribben, Joseph Grochowski, Justin Gullekson, Scot Hanson, Darin Hargreaves, Pamela Heimdal, Michael Hess, Michael Hochstetler, Lori Hoefener, James Householder, Daniel Katan, Jason Kley, Kenneth Kramer, Laura Kuntz, Gary Lage, Elissa Larson, John Layton, Michelle Leisen, Leann Lenander, Jerry Lund, Patrick Lundy, Lucretia Mattson, Ramona Michaels, Joseph Miller, Norman Mitchell, Timothy Munkeby, Matthew Nelson, Brad North, Scott Oeth, James O'Halloran, Dennis O'Hearn, Gary Oliver, Anthony Parr, Thomas Ratelle, Mark Rekow, Timothy Riley, William Rothschild, Lauri Salverda, James Sanders, Channing Schmidt, Kent Schutte, Ryan Shannon, Greg Snider, Fred Sowatzka, Fredrick Sundquist, William Toops, Cynthia Turkington, Mark Veurink, Charles Vomacka, Ronald Wall, Rosemary Ward, Nate Wenner, Michael Westling, Damian Winther, Joshua Wolberg			

1) What did you like most about the presentation?

- A gifted presenter – good subject material & timely topic
- As always, Stuart is great, excellent speaker
- Bringing MN state laws into discussion
- Bringing real life experience to situation and adding humor
- Case studies
- Clear and concise reasoning and relating to his viewers. Simple, easy to follow handouts
- Clear and thorough explanations in plain English
- Clear examples – Upbeat attitude
- Clear explanations
- Clear, concise – Good presenter!
- Clear, focused
- Content changes – News was great
- Credible, clearly understandable, humor and anecdotes – Left time for questions
- Delivery
- Delivery – understandable – Thank You!
- Easy discussion, very understandable
- Example/story and applied to various scenarios
- Examples are very important & he did a good job in this area
- Excellent review
- Excellent speaker – Engaging
- Experience – Knowledge
- Give a broad history on estate tax laws & the future estate tax laws (what we know today)
- Good

- Good – practical in format
- Good amount of info in time allotted
- Good at exploring a complicated subject in an understandable, applicable way
- Good basic overview
- Good delivery
- Good examples (2)
- Good for this audience – he clearly can present at advanced levels as well
- Good info, Nice presentation style
- Good informal, but since nothing has happened it is difficult to listen to the same old
- Good information – Nice speaking voice and speed
- Good knowledge base
- Good pace, hand outs concise and effective
- Good presentation – he certainly knows his subject
- Good speaker
- Good – Thanks! (2)
- Great delivery – Very knowledgeable – He didn't use the annoying term "death tax" even once.
- Great job of explaining current situation on estate taxes and in country
- Great presentation (3)
- Great presentation given uncertainty of future tax law changes. Had never heard of transfer on death deed – Great client info
- Great presenter – keeps things moving
- Great speaker – Great content
- Great speaker – Very knowledgeable
- Great speaker!
- Great speaker, good info
- Have Stuart to a chapter meeting when/if ever congress decides on Estate Tax Reform
- He does a great job on a difficult to understand area
- He is a good presenter and very knowledgeable – he is a good annual resource for legal update each year.
- He is very knowledgeable
- He makes estate planning (a difficult subject) easy to learn
- He seemed very knowledgeable on the subject – very thorough
- High level – Historical context
- Historical perspective, future thoughts
- History of State Estate Taxation
- I think the case study was helpful to understanding
- Important topic – Lost track a few times
- It's not as much estate taxes and laws that change – people and their situation changes.
- Just great as he did it
- Knowledgeable
- Knowledgeable about subject matter – Great presenter
- Knowledgeable about subject matter, timely estate planning issues on federal state level. Excellent speaker
- Knows his material
- Lengthen presentation
- Made "estate planning" and updates easier to understand
- Made good use of a dry but important topic. Thanks for the focus on Eco vs State
- MN law
- Mr. Bear is an excellent presenter
- Mr. Bear was a great presenter. Thank you for bringing him in
- Need this every year
- Nice presentation of the history of estate taxes and some thoughts about future as well as present recommendation.
- Nice tie to MN law
- Nothing new?! Darn!
- Obviously very knowledgeable
- One of the best presenters. Articulate with good examples. Knowledgeable. Demeanor
- Organized, useful, information
- Outstanding presenter
- Perfect
- Practical framing of the issues
- Prepared – Good presenter
- Style
- Takes topic & makes it interesting
- The differentiation between federal and state estate taxes

- The fact how estate taxes came into being along with marital deduction, etc.
- This was very hard for Stuart to plan. He did a Great Job!!
- Thorough explanation of how we got to the present estate tax law uncertainty.
- Timely & pertinent info
- Update on “problems” pending
- Use power point slide. Don’t like making print outs
- Very applicable to my business. I need to hear information on the topic early at this symposium.
- Very clear and a good speaker
- Very clear speaker – Covered right topics
- Very credible
- Very good – Simplified
- Very good presenter – Timely topic
- Very good real life examples. Discussions on various possibilities for Estate Taxes going forward
- Very good speaker
- Very good with stories
- Very important information on tax law.
- Very informative
- Very knowledgeable, up to date

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

- A “things to remember tip sheet” as a follow up would be amazing! I would reference it often
- A bit more time & slower explanation of current/potential estate tax examples
- Ad lib examples confusing, need to use visuals rather than just verbal
- Check the details of rates, history, etc.
- Could easily be one of the two hour presenters
- Discuss more on proposed changes to GRATs, FCPs, Etc.
- Get the government to make a decision
- Going back in history sets context, but also take time would look as today and forward for best use of time
- Good slides would have been great!
- Have slides on projector simultaneously!!
- Have the presentation on the overhead
- Less on historical at beginning
- Maybe he can speak @ monthly meeting when the next tax is passed
- More discussion on GRAT’s, FLPs, etc.
- More examples
- More info on handouts
- More time for Q & A
- Need a power point – I had no handout to follow. Didn’t seem organized
- Needs to utilize slides
- No slides
- None (19)
- Nothing big – he was put in the difficult position of not having changes to the estate law to discuss
- Nothing on screen/slides or handouts
- Nothing specific
- Our group (CFPs) may be more advanced than this presentation... or, maybe not
- Presentation on the screen
- Put outline and example on large screen
- Tell his audience what he did to become such a good presenter!
- Too basic – expand the planning options & discuss
- Use his power point presentation “hit the clicker”
- Use power points! I was struggling to follow him
- Use slides so I don’t have to look at my book
- Use some slides to gain attention of group
- Use your power point
- Walk through calculations via overhead, etc. Instead of “in head”
- Would like more time on this topic

Stuart Bear – Elder Law Update

Rating 3.68 out of 4.0	4	3	2	1
Wednesday • 373 evaluations				
Program content 3.64	233	119	4	0
Presentation 3.64	240	118	7	0
Learning objectives met?	223	126	6	1
Materials accurate?	218	123	5	2
Handouts/av satisfactory?	199	123	21	4
Effective presenter? 3.76	272	76	4	0
Appropriate time allocated?	211	114	21	9
Facilities/tech equip appropriate?	206	130	17	0
Presentation was:	Basic: 34 Intermediate: 210 Advanced: 90			
How often would you like to hear Stuart speak?	Next Year: 190 Every Few Years: 142 Once is Enough: 7			
How often would you like an update on this topic?	Next Year: 196 Every Few Years: 133 Once is Enough: 3			
Wants additional information:	Chad Babcock, David Baldwin, Dana Basballe, Paul Basballe, Sophia Bera, John Bergstrom, Charles Blossom, Rebecca Botzet, Steven Bullert, Alexander Bush, Sharon Calhoun, Leo Carton, David Cook, David Daline, Lynn Daly, Eric Davidge, Perry Diede, Paula Doroff, Stephen Fischer, Scott Foreman, John Fox, Jill Frey, Gary Gallagher, Dennis Gianoli, Danica Goshert, Joseph Gribben, Joseph Grochowski, Scot Hanson, Michael Hess, Michael Hochstetler, Lori Hoefener, Suzanne Holt, James Householder, Daniel Katan, Jason Kley, Kenneth Kramer, Gary Lage, Timothy LaPean, Elissa Larson, Douglas Last, John Layton, Michelle Leisen, Paul Light, Patrick Lundy, Lucretia Mattson, Jennifer McCool, Ramona Michaels, Joseph Miller, Norman Mitchell, C. Buzz Moen, Timothy Munkeby, Marc Nall, Brad North, John Oberg, Scott Oeth, Berthel Olsen, Anthony Parr, Thomas Ratelle, John Rehl, Mark Rekow, Peter Rekstad, Timothy Riley, Ronald Rydell, Lauri Salverda, James Sanders, Kent Schutte, Ryan Shannon, Greg Snider, Katherine Stienessen, Melissa Sturdevant, Fredrick Sundquist, Dean Tesch, William Toops, Cynthia Turkington, Charles Vomacka, Ronald Wall, Nate Wenner, Michael Westling, Damian Winther, Joshua Wolberg			

1) What did you like most about the presentation?

- A lot of good information
- Case study
- Clarity
- Clear examples that represent real life situations
- Content was excellent. He does an excellent job using examples to make it understandable
- Didn't read slides – made presentation by adding value
- Easy to hear his speaking through microphone
- Easy to listen to/good clean voice
- Easy to understand
- Entertaining. Love the case studies.
- Excellent – continue to bring Stuart back
- Excellent knowledge
- Excellent presenter
- Excellent review, key content for planners
- Excellent, basic summary
- Experience in law and speaking excellence
- Good example cases
- Good examples (3)
- Good presentation
- Good presenter
- Good refresher. Good job.
- Good relevant stuff
- Good reminder
- Good topic
- Good update on elder care (2)

- Great examples to follow through information (3)
- Great info
- Great knowledge and examples
- Great presentation (2)
- Great presentation – please bring back for updates as needed
- Great presenter (3)
- Great speaker and content
- Very knowledgeable (2)
- His manner of presentation
- Interesting examples
- Just enough anecdotal stories
- Kept my attention
- Knowledgeable, easy to understand
- Knows his material well, it appears
- Learn latest laws
- Made complicated area of the law understandable
- Made it simple
- Much needed information
- Nice job
- Pertinent topic
- Practical
- Real life examples helped understand how we could use this with certain clients
- Relevant interesting understandable
- Relevant material to most clients
- Simplicity
- Speaks with assurance. His mastery of the subject matter. Good, straight forward examples.
- Specific details given
- Thank you Stuart. Great command of info. Very approachable for 1:1 follow up questions
- Thanks for the refresher
- This topic is so necessary for this symposium. We need to make this a 2 hour presentation.
- Timely information ...growing need with an aging population of seniors and baby boomers. Will become even more important in the years ahead.
- Tons and tons of info. Practical and applicable
- Update on complex topic
- Use examples in outline to support teaching concepts
- Useful detail
- Very applicable
- Very clear
- Very clear perception. Excellent examples
- Very good broad brush strokes about important topic most clients ask questions on.
- Very helpful stuff
- Very informative and relevant to my financial planning interests.
- Very practical information, real examples
- Very relevant information

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

- A basic outline on powerpoint
- As some of us 'go green' and chose not to have handouts in their folders, it would be nice to see what the speaker is referring to on the screen (I still take notes)
- Break down examples on presentation slides so it is clear where you are speaking about...if moving on in notes/handouts, can keep example on screen
- Didn't put any info on overhead so if I didn't get the hand out maters (ie going green) it would have been very difficult to follow along.
- Give him two hours
- I need more info on asset transfers, spousal impoverishment – not a clear understanding on this (not Stuarts problem – fine presentation)
- Longer time allotted
- Make it 90 minutes
- More examples
- Need material printed for 'green' attendees
- Need more time allotted for presentation and Q & A – this is becoming a big issue
- Need slides on overhead

- Need slides. Hard to follow, no outline, no structure.
- Need to utilize overhead or power point
- None. He did a great job
- Our clientele rarely have issues like the ones discussed, as the presentation was not that useful on a practical level.
- Put examples up on the screen in the front of the room (6)
- Slow down
- Straightforward
- Stuart needs to check his # on his outline for accuracy...sometimes missing 0 makes for confusing illustrations.
- Take it deeper, allocate more time than 1 hour
- To those of us going green it would have been helpful to have overheads prepared.
- Too short of time
- Transfer strategies to remove assets from the estate rather than strategies to impoverish our clients
- Use power point since we do not all have the book with slides (4)
- We need more time on this.
- What about LTC partnership program? Should include this in your program. Fits with planning for families with modest wealth
- Would have liked case studies specifically gone through on screen & in book (handouts)

Bob Keebler – New 3.8% Medicare “Surtax”

Rating 3.65 out of 4.0	4	3	2	1
Wednesday • 369 evaluations				
Program content 3.63	242	104	15	0
Presentation 3.59	225	121	14	0
Learning objectives met?	223	116	20	0
Materials accurate?	241	104	12	1
Handouts/av satisfactory?	232	114	9	3
Effective presenter? 3.74	271	67	13	0
Appropriate time allocated?	190	123	38	8
Facilities/tech equip appropriate?	216	132	10	1
Presentation was:	Basic: 6 Intermediate: 121 Advanced: 225			
How often would you like to hear Bob speak?	Next Year: 202 Every Few Years: 138 Once is Enough: 13			
How often would you like an update on this topic?	Next Year: 242 Every Few Years: 80 Once is Enough: 21			
Wants additional information:	Benjamin Auckenthaler, David Baldwin, Phil Barnhill, Dana Basballe, Paul Basballe, John Bergstrom, Robert Bjork, Rebecca Botzet, Gregory Brown, Steven Bullert, Alexander Bush, Sharon Calhoun, Brian Carlson, Ryan Carruth, Leo Carton, Kathy Chen, Trever Christian, James Clemensen, Theodore Contag, Jennifer Cords, David Daline, Lynn Daly, Eric Davidge, Jeff Dekko, Perry Diede, Ford Droegemueller, Stephen Fischer, John Fox, Gary Gallagher, Dennis Gianoli, Michelle Gonzalez, Danica Goshert, Joseph Grochowski, Justin Gullekson, Travis Hansberger, Lynn Hedrick, Steven Heimermann, Heidi Helmeke, Michael Hess, John Hinz, Michael Hochstetler, Nicholas Hohn, James Householder, Paul Jarvis, Timothy Jenneke, Craig Jergenson, Daniel Katan, Kenneth Kramer, Laura Kuntz, Debra Kuper, Timothy LaPean, Elissa Larson, Robert Lawson, John Layton, Michelle Leisen, Leann Lenander, Jerry Lund, Patrick Lundy, Brian MacDonald, Lucretia Mattson, Jennifer McCool, Sean McDermott, Brian McKnight, Marianne Merriman, James Mertz, Ramona Michaels, Joseph Miller, Brent Mueller, Timothy Munkeby, Eric Munkeby, Brad North, John Oberg, Scott Oeth, James O'Halloran, Dennis O'Hearn, Gary Oliver, Kenneth Olson, Matthew Osborne, Heather Patrek, David Pederson, Jason Plank, Benjamin Potthoff, David Pratt, Thomas Ratelle, Mark Rekow, Peter Rekstad, Timothy Riley, William Rothschild, Ronald Rydell, Lauri Salverda, James Sanders, David Schwandt, Paul Schwartz, Ryan Shannon, Greg Snider, Fred Sowatzka, Adam Stern, Fredrick Sundquist, Andrew Tate, Dean Tesch, Jeffrey Thorup, William Toops, Cynthia Turkington, Mark Veurink, Charles Vomacka, Ronald Wall, Nate Wenner, Damian Winther, Joshua Wolberg			

1) What did you like most about the presentation?

- Best , most prepared speaker of 2010
- Best speak of all (3)
- Case studies are very useful
- Case studies were very helpful
- Clear/concise (3)
- Delivery (4)
- Engaging (3)
- Enthusiasm/Passion/Energy
- Excellent (13)
- Excellent materials and presentation
- Good Examples (17)
- Good Information (9)
- Good presentation (3)
- Good strategies on a developing issue
- Great Speaker (9)
- In depth, robust content
- Making tax year cut offs at Nov. 30th
- Nothing, he was the poorest speaker of the symposium
- Planning opportunities and questions to ask clients
- Powerful
- Presents well (3)
- Tax Income discussion (4)
- Thanks for all the examples & explaining the answers.
- The cheat sheet provided
- This is the kind of stuff planners really need!
- Timely (6)
- Useful
- Very knowledgeable (26)
- Very well prepared (2)

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

- A break in the middle would have been good (9)
- A lot of info in a short period of time
- Bounced around a lot, use fewer examples, take is slower and in greater detail
- Break up into 2 sessions (7)
- Could have covered material in 45 minutes not 1.5 hrs (5)
- Dive deeper into strategies (Roth conversion, etc)
- Don't call on people, instead ask for a response- This isn't school, you are presenting to professionals.
- Focus on income tax strategies
- Focused too much on very narrow topics
- Give fewer examples and materials but go over them more thoroughly
- Include decision making flow chart/grid
- Keep up the good work!
- Law does not go into effect until 2013 but great idea to learn about this now, going to need this again.
- Learn more about the audience
- Less technical
- Limit the number of times you say "Ok" and "Now" (9)
- Material should be in book not on screen
- Math can be overwhelming part of the presentation
- Need more time
- Overconfident/cocky
- Overhead was hard to read
- Planning opportunities
- Please provide a link to his xcel spread sheets, etc.
- Presentation might come across better with a bit less self aggrandizing. Short term focus on the tax rates, huge up front bill to pay when rates may be lower in 20-40 years. Kids likely in lower rates.
- Remove errors on slides
- Slide 16 equation is wrong
- Slow down /Talk Slower (9)
- Some of the names of people in the examples were mislabeled.
- Stay off politics

- The surtax applies to a small population so the content just wasn't that applicable.
- This is an advanced presentation and should be a branch-out
- Too many similar examples
- Too much content for time allotted (11)
- Too much time on Medicare surtax
- Too much time on this topic
- Use 3-4 sample client case studies throughout presentation
- Would have preferred a one-hour course

Economist Panel – David Kelly, Jerry Webman, Rick Golod

Rating 3.84 out of 4.0		4	3	2	1
Wednesday • 309 evaluations					
Program content	3.84	249	49	0	0
Presentation	3.86	253	41	0	0
Learning objectives met?		248	50	0	0
Materials accurate?		249	41	1	0
Handouts/av satisfactory?		231	55	8	0
David Kelly - Effective presenter?	3.92	271	25	0	0
Jerry Webman – Effective presenter?	3.84	252	47	1	0
Rick Golod – Effective presenter?	3.82	234	52	10	0
Appropriate time allocated?		221	67	3	4
Facilities/tech equip appropriate?		211	75	5	0
Presentation was:	Basic: 20 Intermediate: 163 Advanced: 72				
How often would you like to have an Economist Panel presentation?	Next Year: 215 Every Few Years: 22 Once is Enough: 0				
Wants additional information from David Kelly:	Charles Anderson, Benjamin Auckenthaler, John Barbier, Dana Basballe, John Bergstrom, Michael Bishop, Paul Block, Rebecca Botzet, David Bremer, Gregory Brown, Steven Bullert, Alexander Bush, Scott Bye, Brian Carlson, Michael Carpentier, Ryan Carruth, Leo Carton, David Clausen, James Clemensen, David Cook, David Daline, Lynn Daly, Eric Davidge, Larry DeGraaf, Jeff Dekko, James Delamater, Perry Diede, Tracy Dostal, David Dresbach, James Driscoll, Ford Droegemueller, Scott Foreman, John Fox, Andrew Frye, Gary Gallagher, Dennis Gianoli, Danica Goshert, Joseph Gribben, Stephen Hampton, Pamela Heimdal, Michael Hess, Steven Hess, John Hinz, Michael Hochstetler, James Householder, Timothy Jenneke, Craig Jergenson, Eric Johnson, Thomas Karp, Daniel Katan, Todd Kelzenberg, Jason Kley, Gerald Knutson, Marc Kowalski, Kenneth Kramer, Margaret Kruse, Laura Kuntz, Debra Kuper, Gregorie Kvilhaug, Gary Lage, Timothy LaPean, Elissa Larson, Joseph LaVine, Robert Lawson, Michelle Leisen, Leann Lenander, Paul Light, Peter Ludwig, Patrick Lundy, Dean Maschka, Lucretia Mattson, Alex Mayrand, Jennifer McCool, Brian McKnight, Brad Melby, Marianne Merriman, Ramona Michaels, Joseph Miller, Norman Mitchell, William Nelson, Scott Nelson, Royce Nies, Troy Noor, John Oberg, Gary Oliver, Berthel Olsen, Chad Olson, Steve Olsonoski, Anthony Parr, Heather Patrek, David Pratt, Thomas Ratelle, John Rehl, Mark Rekow, Peter Rekstad, William Rothschild, Anne Russell, Ronald Rydell, Lauri Salverda, James Sanders, Robert Saunders, Julieann Schroeder, Ryan Shannon, Scott Simpson, Michael Sipe, Greg Snider, Fred Sowatzka, Adam Stern, Katherine Stienessen, Elizabeth Stromberg, Fredrick Sundquist, Dean Tesch, Jeffrey Thorup, Jane Truckenbrod, Ronald Wall, Nate Wenner, Carl Whaley, Damian Winther, Joshua Wolberg				
Wants additional information from Jerry Webman:	Charles Anderson, Dana Basballe, John Bergstrom, Paul Block, Rebecca Botzet, David Bremer, Steven Bullert, Alexander Bush, Scott Bye, Brian Carlson, Michael Carpentier, Ryan Carruth, Leo Carton, Kathy Chen, David Clausen, James Clemensen, David Cook, David Daline, Lynn Daly, Eric Davidge, Jeff Dekko, James Delamater, Perry Diede, Tracy Dostal, Ford Droegemueller, Scott Foreman, John Fox, Andrew Frye, Gary Gallagher, Dennis Gianoli, Danica Goshert, Joseph Gribben, Stephen Hampton, Michael Hess, Steven Hess, John Hinz, Michael Hochstetler, Timothy Jenneke, Thomas Karp, Daniel Katan, Jason Kley, Gerald Knutson, Kenneth Kramer, Laura Kuntz, Debra Kuper, Gregorie Kvilhaug, Gary Lage, Timothy LaPean, Elissa Larson, Michael Lauer, Joseph LaVine, Michelle Leisen, Leann Lenander, Paul Light, Peter Ludwig, Patrick Lundy, Lucretia Mattson, Alex Mayrand, Jennifer McCool, Brian McKnight, Brad Melby, Ramona Michaels, Joseph Miller, Norman Mitchell, William Nelson, Scott Nelson, Royce Nies, Troy Noor, John Oberg, Gary Oliver,				

	Berthel Olsen, Chad Olson, Steve Olsonoski, Matthew Osborne, Anthony Parr, Jason Plank, Justin Prescott, Thomas Ratelle, John Rehl, William Rothschild, Anne Russell, Ronald Rydell, Lauri Salverda, James Sanders, Robert Saunders, Julieann Schroeder, Ryan Shannon, Scott Simpson, Greg Snider, Fred Sowatzka, Adam Stern, Elizabeth Stromberg, Fredrick Sundquist, Dean Tesch, Jeffrey Thorup, Nicholas Thunker, Ronald Wall, Nate Wenner, Carl Whaley, Damian Winther, Joshua Wolberg
Wants additional information from Rick Golod:	Charles Anderson, Dana Basballe, John Bergstrom, Michael Bishop, Paul Block, Rebecca Botzet, David Bremer, Steven Bullert, Alexander Bush, Scott Bye, Brian Carlson, Michael Carpentier, Ryan Carruth, Leo Carton, David Clausen, James Clemensen, David Cook, David Daline, Lynn Daly, Eric Davidge, Jeff Dekko, James Delamater, Perry Diede, Tracy Dostal, Ford Droegemueller, Stephen Fischer, Scott Foreman, John Fox, Andrew Frye, Gary Gallagher, Dennis Gianoli, Joseph Gribben, Stephen Hampton, Michael Hess, Steven Hess, John Hinz, Michael Hochstetler, James Householder, Timothy Jenneke, Craig Jergenson, Daniel Katan, Jason Kley, Gerald Knutson, Kenneth Kramer, Debra Kuper, Gregorie Kvilhaug, Timothy LaPean, Elissa Larson, Michael Lauer, Joseph LaVine, Michelle Leisen, Leann Lenander, Paul Light, Peter Ludwig, Patrick Lundy, Dean Maschka, Lucretia Mattson, Alex Mayrand, Jennifer McCool, Brian McKnight, Brad Melby, Ramona Michaels, Joseph Miller, Norman Mitchell, Arlene Myers, William Nelson, Scott Nelson, Matthew Nelson, Joseph Nelson, Royce Nies, Troy Noor, John Oberg, Gary Oliver, Berthel Olsen, Chad Olson, Steve Olsonoski, Matthew Osborne, Anthony Parr, Jason Plank, Justin Prescott, Thomas Ratelle, John Rehl, William Rothschild, Ronald Rydell, Lauri Salverda, James Sanders, Robert Saunders, Julieann Schroeder, Ryan Shannon, Scott Simpson, Greg Snider, Fred Sowatzka, Clayton St. George, Adam Stern, Katherine Stienessen, Steven Storkan, Elizabeth Stromberg, Fredrick Sundquist, Dean Tesch, Jeffrey Thorup, Nicholas Thunker, Ronald Wall, Nate Wenner, Damian Winther, Joshua Wolberg

1) What did you like most about the presentation?

- 3 views /3 different perspectives (11)
- A variety of perspectives (2)
- Always one of the most anticipated programs
- Always the best part of the FPA
- Best part of the show
- Best part of the symposiums
- Challenges me to be a better student
- Clear and concise and know their stuff
- Clear and knew their stuff
- Concise with a lot of time for questions
- Depth of expertise of presenters (3)
- Diverse opinions on economy
- Diversity
- Excellent (11)
- Excellent insight , well articulated, useful information
- Golod is a great part of the panel offering strategy insight to compliment Webman and Kelly. All three are great.
- Good closing
- Good overview of why they don't take double dips, recession is going to happen
- Great Information (4)
- Great insight
- Great job (5)
- Great panel
- Great speaker and content
- Highlight of every year (7)
- Honesty
- Humor
- I look forward to this platform every year
- I love Rick's strategic thoughts for strategic asset allocation for my clients

- I want to be put on the mailing list for the Guide to the Market (Dave Dresbach)
- Investment ideas
- Julianne is a great person to be in charge FPA symposium
- Let's find someone to replace Golod (ask American Funds or Stonebridge)
- Liked the data and forecasts of the economy
- Love this panel!
- Most impressive part of the symposium
- My favorite part of the two days!
- Newsletter
- Panelists did a good job of each bringing a unique perspective as opposed to reiterating what previous speakers said. (2)
- Perfect
- Presentations were the perfect length
- Quality of speakers was high all had very good materials.
- The passion and knowledge of the presenter
- Varying opinions and healthy debate
- Very informative (2)
- Want them back next year (17)

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

- 2.5 hours in middle of afternoon is tough
- Better presentation of slides- clearer color (4)
- Color handouts
- Did not like Rich Golod's outlook and would not want him back.
- Don't have Q&A at end of presentation or on second day
- Economist panels was too long and repetitive
- Have each participant predict certain factors and track who was the best predictor of economic performance (not mkts)
- Have more divergent opinions too much of the same
- Have some of the side data on a separate sheet
- Long time to sit still
- Make it shorter and have a break in the session (6)
- More time split over 2 days
- Need to be fresh and not have people looking at their watches
- Pick good ideas - Could presentation go more from "A to Z" linking each piece together?
- Provide time horizons for investment ideas
- Shorten to 1.5 hours
- Specific asset class recommendations to act on.
- Start and End on time
- Submit questions in advance and pick the most relevant ones.
- Would have liked the Fed Reserve speaker to debate with the economists. (2)

Financial Essentials – What's Your Plan?

Jeremy Oliver, Christine Damico, Brian Martin, Molly Sullivan

	4	3	2	1
Wednesday • Evaluations done off-line				