

# Agenda

Thursday, June 21, 2007

- 8:15 – 8:45 am      **Breakfast:** *Sponsored by Fidelity RIA Group*
- 8:45 – 9:00 am      **Welcome:** *Phillip Fournier*
- 9:00 – 10:30 am      **A View of the World:** *Featured Speaker TBD*
- 10:30 – 11:00 am      **Break/Office Calls:** *Sponsored by JP Morgan*
- 11:00 – 12:00 pm      **Roundtable: Financial Planning in Tomorrow's World**  
Dick Vodra will be moderating a roundtable discussion on the challenges facing a financial planner to create roadmaps that can take into account longer life, lower social security benefits, Medicare in bankruptcy, commodity shortages, transitioning generational wealth, the changing lifestyle demands of the next generation retirees, as well as other demographic shifts.  
How will these events impact what financial planners are doing today to plan for those future events? What can planners do to add value to their relationships?
- 12:00 – 1:30 pm      **Lunch:** *Sponsored by Allianz,*  
*Featured Speaker: Tim Schoeffler*  
Building a Legacy through the Next Generation. Allianz contracted a study that examined the dynamics between the retiree generation now and their heirs. There are many interesting aspects to the transition of wealth; and how you can best position yourself to work with both generations. You would be surprised to learn that many of these items are not about money at all.

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1:30 – 3:00 pm

**Legacy Advisors Update**

Larry Gaffey, CEO, will review the changes occurring within Legacy like technology, recruiting, personnel, and marketing to name a few. He will offer insight into the new initiatives that will positively impact the consultants.

3:00 – 3:15 pm

**Break/Office Calls:** *Sponsored by First Trust Portfolios*

3:45 – 5:00 pm

**Roundtable: Consultants' Best Ideas:** *Sponsored by Thornburg Funds*

Dan Riley of Thornburg Funds will be moderating this highly interactive discussion. Consultants are asked to bring their very best ideas to share with everyone. These ideas can be found in a variety of areas like practice management, investments, financial/estate planning, marketing, or technology.

5:30 – 6:00 pm

**Cocktails:** *Chima's Steakhouse*

6:00 – 8:00 pm

**Dinner:** *Chima's Steakhouse*

# Agenda

Friday, June 22, 2007

8:15 – 8:45 am

**Breakfast:** *Sponsored by AllianceBernstein*

8:45 – 9:30 am

**Technology Update:** *Phillip Fournier*

9:30 – 9:45 am

**Break/Office Calls:** *Sponsored by Resource Real Estate*

9:45 – 11:45

### **Building Client Relationships**

Rod Burylo is an international speaker on the topic of creating and cementing relationships with clients and even prospects. He has performed keynote addresses for conferences throughout Canada, the United States, and Mexico.

In 2001, Mr. Burylo authored a book titled *Awesome Client Events* which offers a unique system for building client relationships and your notoriety for branding and referrals.

He is recognized as a leading resource on the subject of client-professional relationship building and practice branding.

12:00 – 12:15 pm

**Closing Remarks:** *Phillip Fournier*

# Event Information

**Meeting Location:**

The Tower Club  
8000 Towers Crescent Drive  
17th Floor  
Vienna, VA 22182

**Dinner Location:**

June 21st, 2007 5:30 pm: Cocktails and Dinner  
Chima's Brazilian Steakhouse  
8010 Towers Crescent Drive  
Vienna, VA 22182

Chima's Brazilian Steakhouse is located in the building next to the Tower Club so transportation is not necessary. With regrets, we are unable to extend an invitation to spouses.

**Hotel**

Marriott Hotel  
8028 Leesburg Pike (Route 7)  
Vienna, VA 22182  
703-734-3200

Room Rates are currently \$249-\$309 per night. Rates will increase as it gets closer to the meeting date. You can book reservations on line by going to [www.Marriott.com](http://www.Marriott.com) or by calling 1-800-321-2211.

**Transportation**

Airports: We recommend you fly into Washing Dulles International Airport (IAD). Ronald Reagan International Airport located in Washington DC is also available but is not highly recommended due to traffic and time issues.

**Dress Code**

The dress code is business casual throughout the symposium. Dinner is recommended smart business attire.

**Questions**

For questions about the event, please contact :  
Phillip Fournier at 703-748-5815 or [Phillip.Fournier@legacy-advisors.com](mailto:Phillip.Fournier@legacy-advisors.com)

April 15, 2007

*We are delighted to formally invite you to the Legacy Advisors 1st Annual Wealth Management Symposium.*

*This year's event will be held at The Tower Club in Tysons Corner, VA from June 21st to June 22nd, 2007.*

*The central theme for this year's Symposium is: Managing Long Term Client Relationships. Many of you have relationships that extend 5, 10, 15 and even 20 plus years. How do you keep the relationship fresh and have the client continue to recognize your value in their daily lives?*

*We will discuss this from a number of different angles including referrals, working with the next generation, discussing your future-looking planning techniques, and even ways to keep that fire going with some unique client events.*

*Our Keynote speaker this year is Rod Burylo. Mr. Burylo is an author, lecturer, and educator that is recognized as a leading resource on the subject of client-professional relationship building and practice branding.*

*Mr. Burylo has given keynote addresses for professional conferences throughout Canada and the United States. He has authored the book titled, Awesome Client Events, which is a unique system for using client events as a means to cement your relationships and garner additional referrals through word-of-mouth.*

*In addition to Mr. Burylo, there will be other speakers, some roundtable conversations, a small handful of product companies, and a good social mixer at Chima's Brazilian Steakhouse to discuss a variety of topics.*

*Please email me to confirm your attendance in the event before May 1st. My email is Phillip.Fournier@legacy-advisors.com. Enclosed is the Agenda and other information that can be used to arrange your travel.*

*We value our relationship with you and look forward to your participation.*

*Warm Regards,*

Phillip Fournier  
Senior Vice President  
Legacy Advisors, LLC

**Legacy**  
ADVISORS