# ADVISORCON 2023 **AGENDA** All-Star Edition | Austin, TX





### DAY 1 SESSIONS - OCT 5. 2023

At AdvisorCon 2023, you'll have the opportunity to learn from the best in the business. These legends will share their processes with you, outlining the exact steps and actions they take in different areas to ensure success every time. These processes will cover topics like client engagement, becoming the sole provider, client and strategic partner referrals, running a more efficient business, team training and development, prospecting, time management, and selling. By attending this conference, you'll gain unparalleled access to the daily practices of successful advisors that you can implement in your own work. We highly recommend bringing at least one team member with you to maximize the benefits of this experience. Additionally, all processes will be thoroughly documented both digitally and on paper, ensuring that you don't miss a single step or action.

8:30 AM | Check-in & Mingle

9:00 AM | Welcome & Introductions



**9:10 AM | Next-Gen Processes** Incorporating Modern Technology into Your Business Frantz Widmaier

10:00 AM | 10-Minute Break



**10:10 AM | Southern Hospitality** Processes for Building the Trusted-Advisor Relationship Ray Dunlap

#### 11:00 AM | 10-Minute Break



**11:10 AM | The Prospector's Secret Weapon** The Top Two Processes to Boost Your Prospecting Bryan Sarff

12:00 PM | 1-Hour Break For Lunch

## DAY 1 SESSIONS - OCT 5. 2023

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**1:00 PM | Find the Money** How to Grow Your Business While Transitioning Your Business Rob Rose

#### 1:50 PM | 10-Minute Break



**2:00 PM | Twice the Gain, Half the Pain** Three Processes for Doubling Your Business AND Working Half as Much John Halterman

#### 2:50 PM | 10-Minute Break



**3:00 PM | Secrets of the System Manager** Creating Your Own Processes Michele Tellstone

#### 3:50 PM | 10-Minute Break



**4:00 PM | What's Working Now** The Complete Sales Process from A to Z Matt Hicken & Tony Parmenter

4:50 PM | Adjourn



**5:00 PM | Cocktail Party** Join us for social hour and networking with other Gorillas! All Attendees

## DAY 2 SESSIONS - OCT 6. 2023

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8:00 AM | Bonus Breakfast Presentation The Good Way to Write a Book Jenny Widmaier & Matthew Bailey

#### 9:00 AM | Welcome & Recap



**9:10 AM | Financial First Responders** The Most Important Processes to Grow in Any Market Rhonda & Scott Ferguson

#### 10:00 AM | 10-Minute Break



#### 10:10 AM | Maximizing Your Value

Processes That Make You Worth More than \$1500 an Hour Ed Blumenthal

#### 11:00 AM | 10-Minute Break



#### **11:10 AM | The Iceberg** Three Back-Office Processes for Front-Office Results Barbara Hudock

#### 12:00 PM | 30-Minute Break For Lunch

Enjoy one last chance to swap ideas, compare notes, and make future plans with both the speakers and your fellow attendees.

### DAY 2 SESSIONS - OCT 6. 2023

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**12:30 PM | Secrets of a Superstar Salesman** A Complete List of 2% Changes That Lead to 100% More Growth Chad Henry

1:20 PM | 10-Minute Break



**1:30 PM | Processing Your Way to Sales Success** Unleashing Your Maximum Sales Potential Bill Good

2:30 PM | Adjourn