ADVISORCON

NASHVILLE TENNESSEE

Amplified Prospecting

Revamping the Entire “Prospect Experience”

Clare Carberry
Senior Relationship Manager @ McPeak Wealth Management

Force Multipliers for Sustainable Growth

Seminar Excellence · Business Owner Development


Neil McPeak Jr.
Managing Partner


Clare Carberry
Senior Relationship Manager

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The Seminar System

Step-by-Step Best Practices

01

REFINE THE LIST

Raise the minimum home value threshold to $750K+. Shrink list from ~6,000 to 2–3,000. Fewer invites, far better conversion.

02

CHOOSE A TIMELY TOPIC

Lead with what is top of mind in the market today. Avoid Social Security & Medicare. Use AI, geopolitical risk, market dynamics.

03

ELEVATE THE INVITATION

Custom wedding-style design (Zazzle.com). Your direct RSVP line only. Hard cap: 30 attendees. Turn people away — scarcity signals exclusivity.

04

PROFILE EVERY RSVP

Zillow for home value verification. LinkedIn for job title & industry. Pair top prospects with advisor. Assign relational fits to relationship manager.

05

ASSIGNED SEATING & PITCH BOOK

Control the room with assigned seating. Pitch book on every plate before arrival. Competence book: bios, process, accolades — NOT products.

06

CLOSE WITH CONFIDENCE

Offer free financial plan + initial meeting. Frame it as mutual selection. Stand at front with calendar — book appointments same night.

McPeak Wealth Management Group

of Wells Fargo Advisors Financial Network

May 2026

Meet Our Team

Neil McPeak Sr.

President and Founding Partner

Neil McPeak earned a bachelor's degree in accounting from Drexel University before joining a predecessor firm of Wells Fargo Advisors in 1981. He has received local and industry-wide recognition for his ability as a financial advisor.

Neil has been named one of Wells Fargo Advisors Platinum Council Advisors* from 1993-2023, a distinction held by a select group of Financial Advisors within the firm as measured by completion of educational components, business production based on either of the past two years, and professionalism. In 2026, Neil was ranked #2 to Forbes Best-In-State Wealth Advisors in New Jersey and ranked #5 to Barron's Top 1500 Financial Advisors in New Jersey.

His work ranges from investment planning to portfolio management services. To implement his strategies, Neil draws upon a broad range of investment alternatives to help achieve the optimum fit for a client's specific goals and objectives.

Neil McPeak Jr., CFP®

Managing Partner, Financial Advisor

Neil McPeak Jr. joined the McPeak Wealth Management Group of Wells Fargo Advisors in 2010 with a B.S. in Economics and Concentration in Finance from the Wharton School of the University of Pennsylvania. Working with both individuals and institutions, Neil is responsible for analyzing complex financial situations and providing custom tailored investment solutions to fit client's needs.

In March 2013, Neil became a CERTIFIED FINANCIAL PLANNER®practitioner. Prior to joining the McPeak Wealth Management Group, Neil trained with the US Rowing National Team at the Olympic Training Center in Chula Vista; CA.

Our Custom Planning Process

You are at the center of our process. We thoroughly examine your current financial picture while learning about your goals and concerns.

1 Listen & Understand

The first step in developing a plan is to listen and understand your needs and goals. At this time we will gather all of the necessary information and come to an understanding as to how a client would like to proceed with the planning process.

2 Analyze & Develop a Plan

With four diverse CERTIFIED FINANCIAL PLANNING™ Practitioners on staff we are equipped to tackle a wide array of wealth management challenges. Using our own customized investment planning process, we will look at a client's situation and develop a comprehensive investment plan.

3 Implement

Using an independent, objective, unbiased and cost effective approach, we will implement your plan using the best resources available.

4 Review, Evaluate & Adjust

Our plan and relationship does not stop with implementation, but rather we strive to monitor, evaluate, and adjust your plan as changes in your life and the marketplace arise.

Investment Management Process

We established the following principles to uphold our investment philosophy. Our goal is to construct portfolios taking into account risk, taxes and fees.

1 Asset Allocation

Based upon your risk tolerance, we will develop an appropriate mix of investments.

2 Selection

We are agnostic in our selection in choosing the proper investment vehicle for each asset class.
We do exhaustive research for performance and costs to help ensure appropriate selections for our clients in every category.

3 Weighting

We will implement modest over weights and under weights depending on current conditions in the economy and out outlook for the future.

4 Rebalancing

Rebalancing the portfolio is a strategy designed to mechanically sell some of your holdings and add to those that present great opportunities.

5 Behavioral Benefits

One of our most important jobs is to coach you through the difficult times of the market to stay invested.

6 Tax Efficient Strategies

We use strategies designed to help reduce and efficiently minimize taxes on a personalized basis.

7 Our Value

We strive to bring financial guidance to the individual by building holistic portfolios. We rigorously review positions, assumptions and opportunities.

MCPEAK
WEALTH MANAGEMENT GROUP
of Wells Fargo Advisors

Your appointment with The McPeak Wealth Management Group is scheduled for:

Date: ____

Time:____

McPeak Wealth Management Group

Of Wells Fargo Advisors

1201 New Road

Suite 206

Linwood, NJ 08221

McPeakGroup@wellsfargo.com

www.mcpeakgroup.wfadv.com

Please bring the following:

- Financial Statements
- Expense Report
- Estate Documents
- Insurance Documents

Please contact Clare Carberry at 609-926-7830 if you need to reschedule your appointment.

Working with Business Owners

White Glove Service Model & CPA Referral Strategy

01

BECOME THE CPA'S ADVISOR FIRST

The path to business owners runs through CPAs. But referrals only flow when you are their personal financial advisor. All referral sources are current clients.

02

DEMONSTRATE OVERWHELMING VALUE

Give CPAs the same competence & clarity as every client. Be proactive, be available, be indispensable. Guard the #1 spot aggressively.

03

WHITE GLOVE ONBOARDING

Become the unified point of contact for all operational matters — business and personal. Handle money movement, wires, and account questions directly.

04

BE THE FIRST CALL, EVERY TIME

Respond faster than anyone else. Be reachable for planned and urgent matters. Become the assistant's contact too. Every touchpoint compounds trust.

05

ELEVATE YOUR BRAND TO MATCH

Model your brand after an ultra-HNW family office. Custom website, professional photography, team history page. No prospect should ever come in cold.

06

DEFINE ROLES, PROTECT THE RELATIONSHIP

Every client contacts the Relationship Manager first — always. RM handles operations & service. Advisor focuses on planning, strategy, and growth.


McPeak
Wealth Management Group
Wells Fargo Advisors Financial Network

McPea

Wealth Man

Questions?

Please **raise your hand** and wait for the microphone to be brought to you ***before*** asking your question.

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"FORCE MULTIPLIERS"