MOVING UP AND FORWARD IN 2017

TRAININGCLASS OVERVIEW2017

COMING EVENTS AT VIRTUE

VIRTUE CAPITAL MANAGEMENT • VIRTUE ADVISORS

VIRTUE™ FINANCIAL

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2017 TRAINING CLASS OVERVIEW

Virtue Capital Management University — **Nashville, TN**

- **July 25th, 26th and 27th** *(Power of Zero presentation on July 25th)*
- **September 27th, 28th, and 29th** *(Power of Zero presentation on September 27th)*
- **December 6th and 7th**

Whether you are a seasoned Investment Advisor or have just obtained your series 65/66, this two day training will guide you on how to run a powerful Investment Advisory practice. Virtue Capital Management has one of the most comprehensive marketing platforms in the RIA space. If you are looking for an RIA partner that can help you meet with more qualified prospects and gather more assets, this event is for you. Learn about our proprietary stop loss portfolios, unique marketing platforms, 401KPlanPro system, ground breaking digital marketing system, third party model portfolios, technology offerings, and compliant presentations.

Seminar Training & Marketing for Professionals (STAMP) — **Nashville, TN**

- **October 17th and 18th**

We believe that seminars still play a very important role in marketing at the local level. Virtue is always developing and refining our customized seminars to keep up with the changes in the financial world and consumer needs. We have several proven and successful seminars ready for you to use. Virtue's Seminar Training and Marketing for Professionals event is a dynamic 2 ½ day training program covering the use of internet leads, digital marketing, leveraging centers of influence, and psychographic cluster marketing. During this training we will teach you exactly what to do before, during and after your seminar to reach your full potential. This class is for successful, results-oriented advisors who are looking for a truly innovative partner to help them diversify and expand their marketing efforts.

The Power of Zero Training — **Nashville, TN**

- **July 25th** *(Presenting day one of VCM University training in Nashville, TN)*
- **September 27th** *(Presenting day one of STAMP training in Nashville, TN)*

Join Top of the Table Producer and Best-Selling Author David McKnight as he teaches this exclusive event, featuring David McKnight and his team educating you on every facet of the "The Power of Zero Marketing Program" and showing you how to build your own million dollar marketing plan. David has created a program that is very different from other financial education courses available to attendees and advisors. The course educates attendees on strategies that can reduce taxes during their lifetime as well as passing assets to loved ones in a tax efficient manner. This is a proven marketing strategies used by hundreds of advisors and helped David reach and maintain Top of the Table recognition only marketing in spring and fall of each year.

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Major League Advisor Training Camp — **Albuquerque, New Mexico**

• November 9th and 10th

Virtue has partnered with Lynn B, Thurgood, one of the nation's top financial advisors. Lynn and his team will open their business model and teach you in detail exactly how they gather over $30,000,000 of assets annually. During the training you will attend a live public seminar conducted by Lynn with prospective clients.

You will also learn marketing strategies they conduct throughout the year, how and what Lynn presents in client meetings, how to run an efficient office, client communications sent, as well as client events they hold throughout the year.

Advanced Sales Training— **Nashville, TN**

• July 12th and 13th

Virtue's exclusive semi-annual two-day training is a top-of-the-line learning experience. Advanced sales training is a two day, hands-on, interactive class. This class concentrates on helping producers perfect the art of the client meeting. During day one, we'll cover the step-by-step process of fact finding during the 1st meeting, reviewing and understanding our confidential financial questionnaire (explaining not only how to fill it out, but also how to identify planning opportunities), and what to do between the 1st and 2nd meetings in order to be fully prepared to successfully meet with the prospects during the 2nd meeting.

On day two, learn effective and efficient ways to present your solutions using our new presentation format. This plan is based on the information gathered in the 1st client meeting. Last but not least, learn how to convert them to a satisfied client. This interactive class is limited to 16 producers and is exclusive to those currently active with Virtue Financial.

Operations and Administrative Training — **Nashville, TN**

• August 9th and 10th

Running an office efficiently can be difficult whether you have administrative assistant(s) or you are a handling administrative and operational task personally. Many advisors hold a series 65/66 and insurance license and create financial plans using both securities and insurance productions which blend together nicely to create a comprehensive financial plan. Unfortunately to accomplish many financial plans advisors need to work with multiple insurance carriers as well as a RIA, which means a lot of paperwork to download, fill out, submit and track just to get the plan into place. In addition advisors have many options to illustrate their initial and ongoing recommendations which incorporates using many software solutions. Virtue's operations and administrative training event was designed to help advisors and their administrative staff run an extremely efficient office.

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Business Building Forum — Nashville, TN

• **August 24th - 265th**

By invitation only, Virtue's exclusive annual two-day trip provides the premier information sharing experience. Top advisors from around the country attend this event to share best practice ideas and to network with each other. When it comes to premier study groups, Virtue's is second to none. Advisors experienced in technology, prospecting, marketing, and business planning are invited to this meeting to share with their associates how the latest techniques are used to build a successful financial practice.

Virtue's Annual Elite Conference — San Antonio, Texas

• **January 10th, 11th and 12th, 2018**

Virtue's marquee event is the Elite Conference. This two and a half day training event includes the annual securities compliance meeting for Virtue Capital Management's Investment Advisor Representatives on Wednesday. Whether you are new to Virtue or have been with us for more than a decade, your attendance to this annual event will pay dividends through networking with peers and taking home strategies to implement into your personal practice. Virtue's top advisors and insurance agents from the previous year will be acknowledged at the Annual Awards Ceremony. Each year it is rewarding to see the camaraderie that Virtue's top producers have with one another.

To register for any of these upcoming events click the link below

https://virtue.formstack.com/forms/registration

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