



Insurance Pro Shop®

Helping Insurance Agents and Financial Advisors to quickly and affordably create endless streams of new, repeat and referral business!

Call Us Toll Free 877-297-4608



'Trusted Advisor Success Training' *Live 3 Day Training Event*



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***Important Note:** Please be sure to bring a jacket and tie, as you will have the opportunity to have photographs with Lew, Jeremy and guest speakers. These publicity opportunities will occur at the end of the second day of training, so please be prepared.

Presenters & Guest Speakers

Presented by Lew and Jeremy Nason... *The 9 Out Of 10 Guys!*



Come hear the facts, not theory - Marketing, Lead Generation, Appointment Setting and Sales Strategies designed for financial advisors, and proven to work. **Lew Nason**, RTIA, LUTCF, RFC, with his son **Jeremy Nason**, RFC are Award Winning National marketing and sales coaches, trainers and mentors as recognized by the **'International Association of Registered Financial Consultants'**, the state of Kentucky and numerous insurance companies.

Guest Speaker... Forrest (Wally) Cato, RFMA, CRR, CPC

Cato Says: "You Can Cut A Greater Figure!" Wally is an internationally renowned speaker and Legendary Publicist to the Financial Services Industry who will discuss **how to get \$100,000 of free publicity...** that will make you famous and continuously attract the right prospects to you! Wally has made placements on 60 Minutes, 20/20, etc. He has interviewed five US Presidents in the Oval Office and has co-authored or ghost written seven books appearing on the New York Times best-seller list. He was featured on the front cover of the IARFC Register Magazine.



Guest Speaker... Sandy Schussel, Coach and Author of **BECOME A CLIENT MAGNET** and **THE HIGH DIVING BOARD ...**

As a business and life coach and trainer, Sandy helps you to attract and keep your clients. Listen and integrate the simple messages he presents, and your business or practice will reach new heights of success. Sandy's individual coaching programs are specifically for those individuals who are committed to dramatically increasing their results in life, both personally and professionally - professionals who say what it is that they are going to do and then follow through. **Coaching with Sandy is not for the faint of heart!**

'Trusted Advisor Success Training' Course Agenda

First Day - Consistently Attracting The 'PERFECT' Prospects!

9:00 - 9:20 AM Introduction and Orientation...

- Making The Transition From Just A Salesperson To The 'Trusted Professional' That People Want to See!
- Review of the Financial Problems People are Facing Today... and **How To Help Them!**
- Identifying Your Best Prospects... **The people you have the best chance of attracting and selling!**

9:20 - 10:10 AM How You Can Become The 'Trusted Professional' People Want To See... to create endless streams of new, repeat and referral business!

- **How to consistently generate your 'Ideal' life insurance and annuity leads... even if you have 'No Money!'**
- How and why to tap into the virtually untapped Middle Income Family and Retiree markets to consistently sell more life insurance and annuities!
- How to attract and set appointments with more of the '**Right Prospects**' each month, than most advisors will see in an entire year!
- Properly using Joint Venture Partners, Endorsements From Local Associations, Booklets and Free Reports, Monthly Newsletters, Annual Reviews and more!

Morning Break

10:20 - 11:10 AM How to Create Your Own Marketing Machine - A machine that ensures you have a steady stream of the right prospects... In Spite Of The Economy and Bad Publicity!

- Learn a non-threatening way to have your current Clients, Friends and Family to come to you, and be getting a steady flow of great referrals. And much more!
- Attracting the right prospects for Money for Life, Missed Fortune, Infinite Banking, Circle of Wealth, LEAP and the various Retirement Supplement, Pension Max, Equity Management, College Funding and Annuity Sales Programs!

11:10 - 12:00 AM The Power Of Free Education Workshops and Dinner Seminars...

- Why an Educational Workshop verses a Dinner Seminar?
- What's The Main Objective Of A Workshop or Seminar?
- How to offer an **Educational Workshop... for under \$100!**
- Why Most Advisors Are Only Getting A 10-20% Appointment Rate From Their Events!
- The Secrets to Setting Appointments with 90% of Your Workshop or Seminar Attendees!
- Why You Never Ask For An Appointment!

Lunch Break (Enjoy Southern Cooking at it's best)

12:40 - 1:50 PM **Become A Client Magnet...** By Sandy Schussel

- Attract Clients Don't Pursue Them!
- If You Want More Clients, Do It On Purpose!
- Ask, Believe Take Action!
- **How to make yourself referable to get 40% of your sales from referrals, within a year!**

1:50 - 2:10 PM Preparation for a Successful Client Education Workshop or Seminar...

- Where to hold your workshops and seminars!
- Who to invite!
- What's not working!
- How to maximize attendance!
- Follow-up calls!

Afternoon Break

2:20 - 4:00 PM How YOU Can Get Off To A Fast Start, Even If You Have NO Money...

- **Designing YOUR own marketing plan!**
- Who Are **YOUR** Best Prospects?
- How Do You Get **YOUR** Story Out There?
- How Do You Get **YOUR** Prospects To Call You?

4:10 - 5:00 PM Marketing Review...

'Trusted Advisor Success Training' Course Agenda

Second Day - Fact-Finding and Closing '9 Out Of 10' Sales! (Please come with Jacket and Tie)

9:00 - 10:10 AM Successful Advanced 'Fact Finding' Techniques...

- Transitioning from a Sales Person to 'The Respected and Trusted Financial Professional!
- The Purpose Of A Fact Find?
- Why Advisors Have Trouble with Fact Finds!
- Needs Verses Wants!
- **Helping Prospects To Sell Themselves!**
- Using the two-call close.

Morning Break

10:20 - 11:30 AM Successful Advanced 'Fact Finding' Techniques... (continued)

- How to conduct a thorough fact-find to help your prospects to establish their priorities, so they practically sell themselves and you'll... **Close '9 Out of 10 Sales!'**
- Transition To The Fact-Find... with the Script for the first meeting!
- Becoming the Trusted Financial Professional with Emotion Based Questions!
- Using simple 5-minute presentations to overcome objections!

Lunch Break (Enjoy Southern Cooking at it's best)

12:10 - 1:00 PM Cato Says: "You Can Cut A Greater Figure..." By Wally Cato RFC, RFMA, CPC

- How To Become The Most Trusted and Respected Advisor In Your Local Community!
- The Benefits of Image Branding!
- **The Value of a Press Kit.**
- **How to get \$100,000 of FREE Publicity This Year... to shut-out your competition!**
- **Publicity Pictures, Press Release and More...**

1:00 - 1:50 PM Successful Advanced 'Fact Finding' Techniques... (continued)

- **A much simpler and more effective way to use the powerful Sales Strategies found in...** Money For Life, Missed Fortune, Infinite Banking, LEAP and the various Retirement Supplement, Pension Max, College Funding and Annuity Sales Programs!
- **How to 'Find The Money' to fund those cutting-edge life insurance and annuity sales strategies, to consistently close more and much larger sales!**

Afternoon Break

2:00 - 3:30 PM How To Close '9 Out Of 10' Sales Appointments...

- **How to transition and secure the second appointment for the closing interview!**
- The Closing Interview... Using a Simple Two-Page Presentation to Close 9 Out Of 10!

3:30 - 5:00 PM Fact-Finding Review, Questions & Answers...

Third Day - Setting Up Your Personal Marketing and Sales Plan!

9:00 - 10:00 AM Getting Off To A Quick Start...

- What's The Average Commission Per Case?
- How Many Sales Per Year?
- How Many New Prospects Per Week?
- How Many Second Appointments Per Week?

Morning Break

10:10 - 11:30 AM RFC Certification Exam and Exam Review...

11:30 - 1:00 PM Wrap up, Presentation of Certificates, Photos... (Please Come With A Jacket and Tie)

The 'Trusted Advisor Success Training' will be held at...

Historic Ragsdale Inn, Dallas Georgia

The Ragsdale Inn is a grand southern home constructed in 1905. Built with family in mind from the beautiful wrap around front porch to the spacious parlors and banquet rooms.

The Inn is filled with antiques that reflect a timeless era. All rooms have been decorated to bring out the natural charm and character of the Inn.

Take a moment to look at the original fireplace mantels and wooden floors. Then wander up the staircase to the second floor and see the original transom doors as well as tongue and groove walls. Owners Fay & Joe Stacknik and Jackie Crum-Slay invite you to experience true southern hospitality and great food.

Visiting the Inn is like stepping back in time...



770.443.3440

179 Polk Ave. Dallas Georgia 30132

www.theragsdaleinn.com - theragsdaleinn@aol.com

Located on the corner of Polk Avenue and Ragsdale Place just minutes from the Historic Downtown Dallas.

History

The Ragsdale Inn was built in 1905 by Col. Andrew Jackson Camp. Col. A.J. Camp was born in Randolph County, Alabama, on July 3, 1855. He grew up in Alabama and Heard County, Georgia, but by 1880 had moved to Carroll County where he was teaching school. In 1897, he married Mary Elizabeth Hamrick. He practiced law in Carroll County and later served as Mayor of Villa Rica from 1886-87.

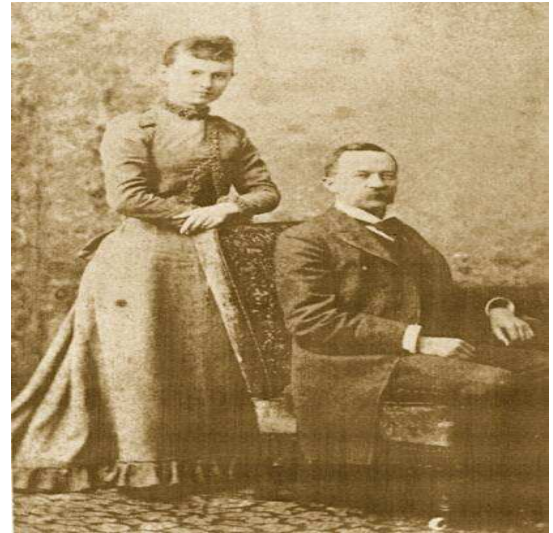
Col. Camp was elected Mayor of Dallas from 1894-95, he also served as City Clerk in Dallas from 1898-99. Residing on Hardee Street Camp purchased 25 acres from Roland Russon for \$1000. Construction started on the Camp-Ragsdale House on January 19, completed on April 13, 1905.

On December 18, 1918 the Camps sold their house to Sanders Walker Ragsdale. Col. S. W. Ragsdale was a lawyer and served as Paulding County's representative in the Georgia General Assembly from 1911-12.

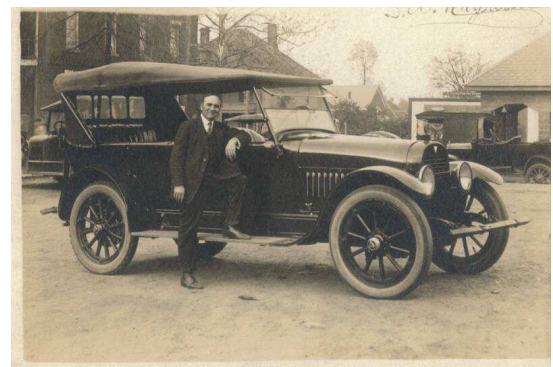
After Col. Ragsdale's tragic death in 1939 the house was sold to his eldest son, Howell Ragsdale. Howell Ragsdale was married to Ola Hitchcock, a local school teacher, who resided in the house until 1999, it was sold to the present owners in 2001.

The Ragsdale Inn underwent full restoration in 2001 by the present owners Joe & Fay Stacknik and Jackie Crum Slay. The house was named in honor of the Ragsdale's who resided here for nearly 100 years. The Inn opened it's doors for business in 2002 becoming the City of Dallas' first Bed & Breakfast.

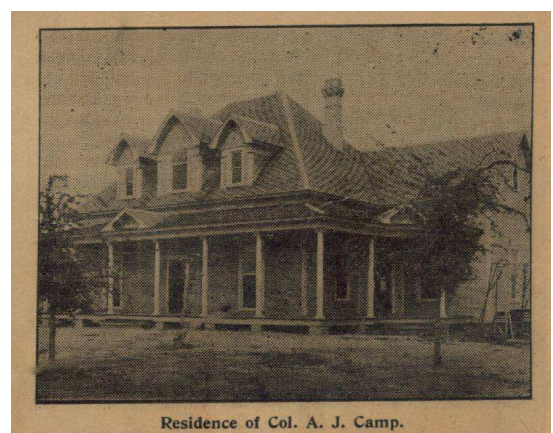
*History and photos courtesy of
Jason Lee Edwards, local historian.*



*Col. & Mrs. A J Camp
Builder 1905*



*Col Sanders Walker Ragsdale
on the square in Dallas*



Residence of Col. A. J. Camp.

*Photo from the Dallas New Era circa 1905
Phone: (770) 445-3379*

Where To Stay

Ragsdale Inn

(770) 490-7630

179 Polk Ave.

Dallas Georgia 30132

<http://www.theragsdaleinn.com/>

The hotel room is at your expense. You can stay in one of the three beautiful rooms available at the beautiful **Historic Ragsdale Inn** - **special discount** - **all rooms \$69.95, on a first come first serve basis.**



**Traveler's Room
One Double Bed**



**Family Room
Two Queen Beds**



**The Suite - One King
& One Day Bed**

A Few Other Choices...

Best Western

(770) 222-9494



Days Inn

(770) 505-4567



If you have any questions about your arrangements , please give Will a call and he will be happy to help you. 877-297-4608

Transportation

The Ragsdale Inn is located in Dallas, Georgia, which is approximately 30 miles from the Atlanta Airport. The following are a few options for transportation...

Rent a car through Enterprise...

Receive Discounts By Using This Corporate Account Number: **03a5219**

Enterprise Car Rental Reservations (open 24 hours) **1-800-261-7331**

Online Reservations **www.enterprise.com**

Atlanta Airport Code is: **ATL**

Take a Taxi...

United Paulding Taxi - (770) 445-1989 - Flat Rate - \$60.00

Provides transportation directly from the Atlanta Airport to the Ragsdale Inn for a flat rate of \$60.00.

Using a GPS...

Address To Ragsdale Inn

179 Polk Avenue

Dallas, GA. 30132

GPS Coordinates

N 33 degrees 55.756

W 84 degrees 50.764

Directions

Directions From Other Lodging to the Ragsdale Inn...

Total Travel Estimate: **9 minutes / 6.46 miles**

1. Start out going **SOUTHWEST** on **PACE RD** toward **PACE CT.** go 0.1 mi
2. Turn **RIGHT** onto **JIMMY LEE SMITH PKWY / US-278 W / GA-6 W.** Continue to follow **US-278 W / GA-6 W.** go 4.1 mi
3. Turn **SLIGHT RIGHT** onto **NATHAN DEAN BLVD / GA-61.** go 0.7 mi
4. Turn **LEFT** onto **MERCHANTS DR / GA-6 BR / GA-61.** Continue to follow **GA-6 BR / GA-61.** go 1.0 mi
5. Turn **RIGHT** onto **N CONFEDERATE AVE / GA-61.** go 0.3 mi
6. Turn **LEFT** onto **POLK AVE.** go 0.1 mi
7. **179 POLK AVE** is on the **RIGHT.** go 0.0 mi

*Directions Provided By Mapquest

Contact Information

**If you experience any difficulty navigating while in Dallas, GA,
Please feel free to contact us at anytime.**

**Insurance Pro Shop
Toll Free: 877-297-4608
Direct Line: 770-443-2852**

**Jeremy Nason
Cell# 770-617-5102**

A Few Local Restaurants



Ruby Tuesday

101 Thomas B Murphy Drive
Dallas, GA 30132
(770) 445-0432



La Cocina

457 Nathan Dean Boulevard
Dallas, GA 30132
(770) 445-2511

Both restaurants are located in the same plaza. Below are directions from the Ragsdale Inn to either establishment.

1. Start out going **EAST** on **POLK AVE** toward **WILLS PL.** go 0.1 mi
 2. Turn **RIGHT** onto **N CONFEDERATE AVE / GA-61.** go 0.3 mi
 3. Turn **LEFT** onto **E MEMORIAL DR / GA-6 BR / GA-61.**
Continue to follow **GA-6 BR / GA-61.** go 1.0 mi
 4. Turn **RIGHT** onto **NATHAN DEAN BLVD / GA-61.**
Continue to follow **NATHAN DEAN BLVD.** go 1.3 mi
 5. **457 NATHAN DEAN BLVD** is on the **LEFT.** go 0.0 mi
-

Other Options...

A few other options located in the same plaza are:

Panda Garden - Zaxby's - Little Caesars - Subway - Kroger Deli

Local Attractions

Why Not Make It A Mini Vacation?

Many of our attendees have come with their spouse and stayed the weekend to enjoy the many of the Local Atlanta area Attractions. Here are a few examples...

**Over 30
Georgia Wineries!**



**Kennesaw Mountain
National Battlefield Park**

**Marietta Museum of History
Civil War Collection**



Georgia Aquarium
Largest In The World
With Over 8 Million
Gallons Of Water

Local Attractions
Why Not Make It A Mini Vacation?



Six Flags Over Georgia

Creekside Golf & Country Club



Zoo Atlanta