

Bill Cates, CSP

DYNAMIC SPEAKER & REFERRAL COACH



High Content
High Energy
High Impact!

“When all 2,000 people stood up to applaud your speech, I knew I had made the right decision to use you.”

– **Joe Filko, Conference Chair**

Northwestern Mutual Life

“You were phenomenal. Seldom has a speaker generated the degree of enthusiastic response that you created during your platform presentation and workshop.”

– **Larry Naiman, Director of Special Events**

Guardian Financial

MAIN PLATFORM PRESENTATIONS | SEMINARS | TRAINING

SEMINARS AND TRAINING PROGRAMS FOR LASTING RESULTS

Building A Thriving 100% Referral-based Business

The four proven strategies of The **Referral Advantage Program**®: enhancing referability, prospecting for introductions, networking strategically, and targeting niche markets.

Client Loyalty & Leverage

The three critical types of client contact that create true client loyalty and high-quality referrals.

Social Prospecting

How to acquire top-level clients through: referral events, client appreciation events, and community service and philanthropic endeavors.

Attracting Affluent Clients through CPAs & Professional Alliances

How to meet and grow productive referral relationships with CPAs and other top alliances.

Building a Stronger Referral Culture (for Leaders & Managers)

The T.R.A.C. System for building a thriving referral culture. Leaders emerge with clear strategies and tactics they can use right away.



“You have a dynamic speaking style. And the best referral training in the industry.”

Dane M. Burkholder, ChFC, CRPC – Manager – Ameriprise Financial

“Your presentation was amazing. Your story on courage is brilliant.”

Martha Cap – Sr. Financial Advisor – Seattle, WA

“Even our 'toughest veterans' were impressed.

We are already getting results!”

Sandra Dorsey – Assistant Vice President – Erie Insurance

How Do You Know When A Speaker Is A Good Investment?

When their program contributes to your bottom line!

That's what Bill Cates will do for you!

MAIN PLATFORM

PRESENTATIONS BY BILL CATES

THAT TEACH, MOTIVATE, AND PRODUCE RESULTS

In You They Trust! (45-90 minutes)

This lively and idea-filled program will unravel the mystery that goes into creating strong, trusting relationships with clients, centers of influence, and prospects.

Bill's field tested and easy-to-implement strategies will help your advisors:

- Build trust quickly in their new relationships.
- Distinguish themselves from all other advisors.
- Get clients following the advisor's suggestions.
- Enhance client loyalty and stimulate referrals.

Referral Secrets of Top Producers (45-90 minutes)

Bill Cates will show your advisors exactly how other top-producing advisors have built a thriving referral-based business. Bill will interview some of your most successful advisors and share their stories and anecdotes with the audience – as well as best practices from many other advisors.

Bill's real-life strategies will show your advisors how to:

- Guarantee client loyalty.
- Grow and maintain a network of great prospects and centers of influence.
- Use Event Marketing and Philanthropic Networking to gain high-level clients.

“You gave us powerful industry examples and humorous anecdotes. You clearly exceeded our expectations!”

Greg Banfield – Manager – North Carolina

“The reaction to your appearance was electric... the highlight of the event.”

Bruce Dickes – Chief Marketing Officer – Financial Brokerage, Inc.

“Your presentation at our conference was a rousing success... you got the highest scores.”

Mark Rannow – Manager of Financial Consultant Program – Thrivent Financial

To Schedule Bill Cates or for Additional Information
800-488-5464 301-497-2200 www.ReferralCoach.com

Many Satisfied Clients

Corporations

American General
American National
Ameriprise Financial
Bank of America
Banker's Life
Bank of Montreal
City National Bank
Capital One Bank
Edward Jones
Farm Bureau
First Command
Lincoln Financial
M&T Bank
MassMutual
MetLife
Mutual of Omaha
New England Financial
New York Life
Northwestern Mutual
Penn Mutual
PNC Bank
Prudential
Raymond James
Morgan Stanley Smith Barney
State Farm
Thrivent Financial
UBS Financial
Wachovia / Wells Fargo

Associations

Million Dollar Round Table
Investment Management Consultants Association
National Association of Insurance and Financial Advisors
Society of Financial Service Professionals
Maryland Bankers Association
Institute for Certified Investment Management Consultants
General Agents and Managers Association

Broker-Dealers

Commonwealth Financial
H.D. Vest
LPL
Schwab Investments
Sigma Financial
Summit Financial

Mutual Funds / Wholesalers

Ivy Funds
Jackson National
Pioneer Investments
Touchstone Investments
Transamerica
Wells Fargo



Bill Cates – High Content, High Energy, High Impact Speaker



The author of two popular books on referrals, *Get More Referrals Now!* (McGraw-Hill), and *Don't Keep Me a Secret!* (McGraw-Hill), and creator of **The Referral Advantage Program®**, Bill Cates has revolutionized the way financial professionals generate high-quality clients through referrals.

Bill has been featured in such publications as *Success Magazine*, *Entrepreneur Magazine*, *Selling Power*, *The Wall Street Journal*, and *Money Magazine*. Bill will talk *with* your audience and not *at* them. Expect a highly interactive session filled with practical strategies that will have an immediate impact on client acquisition.

CONNECT WITH BILL    

To Schedule Bill Cates or for Additional Information
800-488-5464 301-497-2200 www.ReferralCoach.com

Powered by
REFERRAL COACH
INTERNATIONAL