

## Full Agenda

### 1½ Day Referral Champions Training Camp

#### The Learning Starts Even BEFORE the Training Camp

Upon registering, Bill Cates will send to you your pre-camp action steps to help you maximize your results (consisting of some simple worksheets and reports). Don't be surprised if this pre-work begins producing new actions and new results before you even arrive at the Camp.

#### Day 1 – Thursday, April 7, 2016

##### 8:00a – 8:30a Registration & Continental Breakfast in Meeting Room

##### 8:30a – 12:00p Session I (breaks will be every 60–90 minutes)

- Mastering the Law of Perpetual Revenue.
- 10 Ways to get referrals without asking by planting referral seeds.
- Skills practice and coaching.
- Getting your Referral Action Plan™ started.
- The VIPS Method™ for asking for referrals.
- Personalizing your referral conversation.
- Skills practice and coaching.

##### 12:00p – 12:45p Group Lunch

##### 12:45p – 5:00p Session II (breaks will be every 60–90 minutes)

- Mastering your referral conversation.
- Dealing with referral concerns and objections.
- Mastering the referral objection formula — exploring and reframing.
- Knowing when and how to back off your referral request.
- Hot Seats (for the few brave)
- Turning referrals into engaged introductions.
- Receiving referrals in a way that encourages more.
- Saying “thank you” for referrals – the why’s and how’s.
- Continuing with your Referral Action Plan™.



MORE

## Day 2 – Friday, April 8, 2016

7:30a – 8:00a Networking & Continental Breakfast in Meeting Room

### 8:00a – 12:00p Session I (breaks will be every 60–90 minutes)

- Setting appointments from referrals.
- Converting referrals into clients; cutting-edge strategies
- Using the 15-Day Reinforcement Program – creating new habits.
- Continuing with your Referral Action Plan™.

**Our Ironclad Guarantee:** We're confident you will get a ton of value from our Referral Champions Training Camp. Stay for the entire program and, if after this idea-packed 1 1/2 days, you don't believe you've received enough strategies, ideas, and tactics to make a significant impact in your business, we'll refund your entire tuition. Your satisfaction and measurable results is our goal!



## Praise for the Training Camp

### New Focus! Proven Process! Real Results!



**Mike Borchers**  
Financial Advisor  
Atlanta, GA

“The training camp gave us the structure and confidence to ask for referrals with confidence. We’re getting great results. Once you start asking people it’s amazing what doors can open up for you.”



**Rob Cucchiaro**  
Financial Advisor  
Dublin, CA

“If I were to compare the number of referrals meeting before and after your training camp, it’s 1,000 times more. This week I got 6–7 new referrals. The referral training camp has totally been worth it for me.”



**Will Kelly**  
Financial Advisor  
Buffalo, NY

“For what I’ve paid for your training camp, I’ve gotten that back many times over. You’ve given me tools that I will continue to use for the balance of my career.”



**Todd McDonald**  
Financial Advisor  
Albany, NY

“I took away very specific ideas and strategies to help me find the right language to generate new clients. I’ve produced significant results. I can’t tell you how many thousands of dollars I’ve made from what I learned at the camp.”



**Aquiles Larrea**  
Financial Advisor  
Wall Street, New York, NY

“After attended the training camp I doubled my revenue that year. The following year my revenue increased by another 40%. This system really works.”



**Cosmo Boyd**  
Financial Advisor  
Atlanta, GA

“The boot camp gave us a tremendous amount of confidence. Since we’ve started asking for referrals, we’ve been getting great answers. It’s like a truth serum! We ask and the referrals just flow. You made us realize how referable we are. We’ve had almost no resistance from our clients.”





**Alan Temkin**  
Financial Advisor  
Danvers, MA

“With 35 years of experience and a life member of MDRT, this was without question the most helpful investment I have made in a long time. In the first week after the boot camp I held 3 client meetings – using the value conversation – and have received 16 quality referrals. Thank you for a truly great learning experience.”



**Karin Tyson**  
Vice President  
Houston, TX

“We were working with a client who has about \$7mm of investments with us. I insisted that my partner, Gil, add the words ‘value discussion’ and ‘confidentiality’ to the agenda. Gil did this and, without even asking for referrals, the client gave us a referral to an individual with \$3mm of investable assets. This is proof of the importance of the value discussion and that your system really works.”



**Mark Strategos**  
Financial Advisor  
York, PA

“Attending your Referral Training Camp has had a great impact on my business. Because of it, I’ve changed a lot of things I was doing. As a result, I’m getting many more referrals that I wouldn’t have gotten before. My overall business is up. Thank you!”



**Saul Cohen**  
Financial Advisor  
New York, NY

“3 months following your Referral Boot Camp, I’ve obtained more referrals from new and existing clients than I had in many previous years in the business. I’ve taken back control of my activity and my business and am enjoying the business more than I have in years. I will forever be indebted to Bill Cates.”