

2017

8th Annual 7Twelve® Training Conference For Financial Advisors Salt Lake City, Utah Nov 10-11, 2017

Training leader: Craig L. Israelsen, Ph.D.

Registration Fee: \$375* (\$125 for 7Twelve Partners)

* Registration fee includes 200+ slide **7Twelve Education Suite** powerpoint and the Excel-based **Retirement Portfolio Survival Analyzer** (both normally priced at \$250 each).

Send check to Craig Israelsen, 1320 East Hubble Creek Drive Springville, UT 84663
OR

Pay via PayPal by contacting Craig Israelsen at craig@7TwelvePortfolio.com

Friday November 10, 2017 – Conference begins at 1:00 pm

- 1:00 – 3:30 Training by Craig Israelsen
Overview of 7Twelve Portfolio resource materials
Training in the use of the 7Twelve Education Suite – Part I
- 3:30 – 4:15 Salsa bar
- 4:15 – 6:15 Training in the use of the 7Twelve Education Suite – Part II

Dinner on your own or join a group for dinner in SLC

Saturday November 11, 2017

- 8:00 – 8:45 Breakfast at Hampton Inn
- 9:00 – 10:45 Training in the use of the Retirement Portfolio Survival Analyzer
- 10:45 – 11:00 Break
- 11:00 – 12:00 Group discussion with **special guest Marie Swift** (bio on next page)
- 12:00 – 12:45 Lunch
- 12:45 – 1:00 Closing remarks

Conference concludes

Conference location:

Hampton Inn & Suites – Salt Lake City Airport

307 North Admiral Byrd Road

Salt Lake City, Utah 801-519-6504

<http://hamptoninn.hilton.com/en/hp/hotels/index.jhtml?ctyhocn=SLCHSHX>

www.7TwelvePortfolio.com

Rooms at the Hampton Inn are available at a reduced rate of \$109

Please mention “7Twelve Conference” when booking your room.

A complimentary shuttle to/from the SLC airport to the Hampton Inn is available.

MARIE SWIFT - BIO

Marie Swift is President and CEO of Impact Communications, a full-service marketing communications firm serving a select group of independent financial advisors and allied institutions. Impact Communications works solely within the financial services industry. The firm has two service lines – one for highly-successful independent advisors and one for the institutions that support independent advisors.

A thought leader for thought leaders, she is known for bringing some of the industry's best and brightest voices together for dialog and debate. Her Thought Leader Roundtable series, which can be found at www.AdvisorsThinkTank.com, is just one example of how Marie generates interesting conversations with movers and shakers in the financial services industry. Her Best Practices in the Financial Services Industry blog, which can be found at www.MarieSwift.com, provides additional insights and advice, including podcasts, articles, videos and other helpful content for independent financial advisors and the institutions that serve them.



Marie is known for bringing good ideas to financial advisors through her speeches, presentations, podcasts and written works. Over the past twenty years, Marie's articles and expert comments have been published by Forbes.com, MarketWatch.com, Barron's, Wall Street Journal, NAPFA Advisor magazine, MorningstarAdvisor.com, Horsesmouth.com, Financial Planning magazine, Financial Advisor magazine, On Wall Street magazine, Research magazine, RIABiz.com and ThinkAdvisor.com.

PR, social media, digital presence, selling skills, and all forms of marketing and professional communications are her key areas of expertise. She has spoken at major industry conferences such as IAA, FPA and NAPFA events, and other national conferences hosted by allied institutions such as Fidelity IWS, TD Ameritrade Institutional, Schwab Advisor Services, Pershing Advisor Services, Transamerica Financial Services, Cetera Financial Network, Securities America, Investacorp, Garrett Planning Network, Kinder Institute, and many more.

Prior to establishing her own marketing communications firm in 1993, she served as Director of Corporate Communications for Worldwide Investment Network in Irvine, California, where she helped FNIC's then #1 Top Producer attain and maintain that title for five consecutive years. She managed a staff of twenty that supported two-dozen successful registered representatives, estate planners and wealth managers.

A former caterer and gourmet cook, Marie studied the culinary arts while living in Colorado. She enjoys fine dining and rustic meals, family outings, traveling to new places, and long walks with her husband and kids in beautiful Leawood, Kansas.