CMPS Advanced Training Agenda
Client LifeCycle™
San Francisco, CA
Oct. 6-8, 2008
Updated: 9-29-08

DAY 1

- 7:00 – 8:00 – Registration

- 8:00 – 8:15 – Welcome

- 8:15 - 9:45 – **The Market's Story:** Client LifeCycle™ **- Part 1**
    - *Speaker - Gibran Nicholas*
    - Topics - Understanding the latest government intervention and its effects, the economy, the US dollar, the role of currencies and central banks, the Fed, interest rates, LIBOR, FDIC and SIPC, mortgage securitization updates, inflation, deflation, stagflation, the Great Depression

- 9:45 – 10:00 - Break

- 10:00 – 11:30 – **The Market's Story:** Client LifeCycle™ **- Part 2**
    - *Speaker - Gibran Nicholas*
    - Topics - Real estate markets and trends, addressing housing value concerns, scripts and metaphors, real estate and mortgage planning in an uncertain environment, loan modifications and short sales, answering the big question – "Is this a good time to buy a home?"

- 11:30 – 12:15 – Exam #1

- 12:15 – 1:45 – Lunch Break

- 1:45 – 3:15 – **The Client's Story:** Client LifeCycle™
    - *Speaker - Gibran Nicholas*
    - Topics - Inspiring client confidence, helping clients deal with their tragedies (death, job loss, home loss), financial risk management, first time home buyers, raising children, career changes, starting a business, legacy planning, home equity risk management strategies, personal budgeting and cash flow planning, dialogues around money

- 3:15 – 3:30 – Break

- 3:30 – 5:00 – **The Client's Story:** Client LifeCycle™ **- (continued)**

- 5:00 – 5:15 – Exam #2

DAY 1 Ends at 5:15pm

CMPS Institute™ reserves the right to change the speakers and speaker times

DAY 2

- 8:00 – 9:30 – **College Funding Strategies:** ClientLifeCycle™
    - *Speaker – Leon LaBrecque*
    - Topics - rules, strategies and techniques, how to talk to clients, how to talk to financial advisors, dialogue opportunities, case studies

- 9:30 – 9:45 – Break

- 9:45 – 10:45 –**Retirement Planning Strategies:** ClientLifeCycle™
    - *Speaker – Leon LaBrecque*
    - Topics - rules, strategies and techniques, how to talk to clients, how to talk to financial advisors, dialogue opportunities, case studies

- 10:45 – 11:15 – Exam #3

- 11:15 – 11:30 - Break

- 11:30 – 12:30 – ClientLifeCycle™ **BONUS SESSION!**
    - The Credit Crisis and Working With Financial Advisors
    - *Speaker – Leon LaBrecque*

- 12:30 – 2:00 – Lunch Break

- 2:00 – 3:30 – **Elder Care / Reverse Mortgage Analysis & Case Studies:** ClientLifeCycle™
    - *Speaker – Harry Gordon*
    - Rules, strategies and techniques, how to talk to clients, how to talk to advisors, dialogue opportunities, case studies

- 3:00 – 3:20 – Exam #4

- 3:20 – 3:30 – Break

- 3:30 – 5:15 – **Referral Partner's Story & Implementation:** ClientLifeCycle™
    - *Speaker - Gibran Nicholas*
    - Understanding and defining your role, building your Dream Team, marketing yourself and your skills, overview of latest CMPS® member benefits & resources

DAY 2 Ends at 5:15pm

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DAY 3

- 8:00 – 9:30 – **Marriage & Divorce Financial Analysis:** Client LifeCycle™
  - *Speaker – Carol Ann Wilson*
  - Topics - marital property, pre-nuptial agreements, co-habitation, cash flow planning, tax planning

- 9:30 – 10:00 – Exam #5

- 10:00 – 10:15 - Break

- 10:15 – 11:30 - Client LifeCycle™ **BONUS SESSION!**
  - Status and Outlook for the U.S. Economy, Housing and Mortgage Markets
  - *Speaker - Dr. LaVaughn Henry, Director of U.S. Economic Analysis for PMI Group*

- 11:30 – 1:00 – Lunch Break

- 1:00 – 2:15 – Client LifeCycle™ **BONUS SESSION!**
  - How to <u>lead</u> with enthusiasm, passion and purpose
  - *Speaker - Robin Crow*

- 2:15 – 3:00 – Certificate Ceremony

DAY 3 Ends at 3:00pm