

Innovative Strategies & Products for Top Advisors

Conference & Golf Tournament

The Inn at Manitou & the Ridge at Manitou Golf Club
Parry Sound, Ontario, Canada
September 20 & 21, 2006



The Inn at Manitou

A Spa, Tennis, Golf & Conference Resort



Announcing 'Innovative Strategies & Products for Top Advisors' Conference

Conference Co-Chairs: **Don Bridgman** and **Daniel Tutton**

In keeping with its philosophy of creative learning, Mindpath is pleased to announce the first of its 2006 of educational conferences: 'Innovative Strategies and Products for Top Advisors' conference and golf tournament.

Two half-day educational seminars, PM on Day One and AM on Day Two, will be followed by the conference golf tournament on the afternoon of Day Two. This conference will be of particular interest to top producing Financial Advisors, Planners and Brokers.

Hear about the power of the Pareto Business Building System from well-known trainer of Financial Advisors, **Duncan MacPherson**, co-Founder, **Pareto Systems**.



Learn 'Pivotal Growth Strategies for a Successful Advisory Practice' from **Paul Carney**, Advisor Coach and co-founder, **Pivotal Financial Marketing**.



Hedge Funds, Principal Protected Notes and Wrap Accounts are complex in their structure and make-up. This Mindpath conference will feature informative presentations from some of the best in the business. Their goal is to de-mystify these products so they can work effectively for both you and your clients.

Well-established advisors with significant books of business will benefit most from this Mindpath conference. Materials and content will be tailored to the successful advisor.

CE credits available for attendance at the seminars.

Mindpath - A New Kind of Educational Conference and Event Company

Mindpath is a new and different kind of educational conference company for the financial services industry. The goal of Mindpath conferences is to bring 'outside-the-box' thinking and leading-edge learning programs to financial advisors, planners and brokers.

Two of Mindpath's principals, Don Bridgman and Daniel Tutton, are financial industry veterans who bring a combined total of nearly 50 years experience to the company. They also bring a background in the creation and execution of educational conferences, charitable fundraisers and special events to Mindpath.



Conference Agenda

Day One

Wednesday, Sept. 20, 2006

12:00 – 1:00 PM

Welcoming Luncheon

1:00 PM

Registration Desk Opens

1:25 PM

Introductory remarks from the conference co-chairs, **Don Bridgman** and **Daniel Tutton**

1:30 – 2:30 PM

Keynote Presentation
Paul Carney, Co-Founder,
Pivotal Financial Marketing

'Pivotal Growth Strategies for a
Successful Advisory Practice'



Part One: 'Revive Your Client Meetings' - proven methods to revitalize your client meetings and relationships leading to new business and referrals

2:30 – 2:45 PM

Afternoon Refreshment & Networking Break

2:45 – 3:45 PM

Pivotal Presentation, Part Two: 'The Power of Execution' - Pivotal's systematic approach to growing your business

3:45 – 4:15 PM

Hedge Funds Presentation
James McGovern, CEO, Arrow Hedge Partners Inc. & Chair, The Alternative Investment Managers Association (AIMA)



'The Future of Active Money Management' - The True Role & Outlook for Alternatives

4:15 – 4:45 PM

Principal Protected Notes
Presentation

4:45 PM

Business Card Draw

5:00 – 6:00 PM

Networking Cocktail Reception

6:30 – 8:30 PM

Conference Dinner

Day Two

Thursday, Sept. 21, 2006

8:55 AM

Opening comments from the Co-Chairs

9:00 – 10:00 AM

Keynote Presentation, Duncan MacPherson, Co-Founder, Pareto Systems, Calgary, AB

Duncan is one of Canada's pre-eminent trainers of Financial Advisors. His topic will be:

'The Advisor of the Future: An Advisor's Guide to the Pareto System Recommendation Process.'



10:00 – 10:15 AM

Morning Refreshment & Networking Break

10:15 – 11:15 AM

Keynote Presentation, Duncan MacPherson, Pareto Systems, Calgary, AB

11:15 – 11:45 AM

Wrap Accounts Presentation

12:00 Noon

Lunch

1:00 PM

Tee Off Times Commence

6:00 – 8:00 PM

Golf Tournament Dinner

8:00 – 9:00 PM

Golf Prizes and Awards Presentation

Note:

Delegates are welcome to play an optional second round of golf at 'The Ridge' on Friday, Sept. 22 at the conference preferred rate.



Spectacular Setting for Learning and Outstanding Golf

Learn from the pros and industry experts in a spectacular setting. This conference will take place at the exclusive *Inn at Manitou* in Parry Sound, Ontario, recipient of the coveted Relais & Chateau seal of approval. The Inn offers renowned gourmet cuisine, luxurious rooms and excellent service in beautiful surroundings.



Conference Golf Tournament at 'The Ridge'

The conference golf tournament will take place on Day Two at the highly rated, members only *Ridge at Manitou Golf Club*. The Ridge was named best new golf course by Ontario Golf and Fairways magazines. Ontario Golf magazine editor Ted McIntyre described the Ridge as 'a new Tom McBroom masterpiece'.

This may be one of the few opportunities you have to play the Ridge with friends and industry colleagues. Why not reward your top performers and bring a team of players to compete in the conference golf tournament.

First class golf, good friends, fun competition and the great outdoors – an unbeatable combination. Only a limited number of spaces are available – reserve your spot today.

Registration Form

Due to the conference content, this *Mindpath* educational forum will mainly be of interest to top performing Financial Advisors, Planners and Brokers.

Cost to attend the conference and participate in the golf tournament is **\$ 1,095.** + GST. (Based on double occupancy; includes meals and two night's accommodation.)

Single occupancy rate is **\$ 1,690.** + GST. Spouses welcome at the rate of \$ 795. + GST (does not include golf; add golf for \$ 195.)

Please register me and/or my team _____ @ \$ 1,095. _____
(Double occupancy)

Please register me and/or my team _____ @ \$ 1,690. _____
(Single occupancy)

Please register my spouse _____ \$ 795. _____

Please register my spouse for golf _____ \$ 195. _____

Sub-Total: _____

Plus 6% GST: _____

Total: _____

Delegate Name (please print name in full) _____ Title _____

Delegate Name (please print name in full) _____ Title _____

Delegate Name (please print name in full) _____ Title _____

Delegate Name (please print name in full) _____ Title _____

Delegate Name (please print name in full) _____ Title _____

Company Name _____

Address _____

City _____ Province _____ Postal Code _____

Phone _____ Fax # _____ eMail Address _____

Method of Payment

Cheque VISA M/C AMEX

Card Holder's Name: _____

Card Number _____

Expiry Date: _____

Signature: _____

Today's Date: _____

How To Register

You may register in one of the following ways:

1. By faxing the completed registration form toll-free to (866) 244-9837
2. By eMailing the completed registration form to registrations@Mindpath.ca
3. By Mail to *Mindpath* corp.
60 St. Clair Ave. East
Suite 908
Toronto, ON
M4T 1N5
4. By phone: (416) 929-MIND (6463)
Toll-Free: (877) 929-6463

Please complete and Fax Toll-Free to (866) 244-9837

CANCELLATIONS: Refunds will be given for cancellations received in writing by **September 1, 2006** subject to an administration fee of \$150.00 plus GST. If you are registered for the conference and do not attend, you are responsible for the full registration fee unless you cancel by the Sept. 1 deadline. If you register after **September 1**, your order is firm - sorry we are not able to issue refunds after this date. However, delegate substitution is permissible providing the replacement delegate would be considered a top producing advisor of equal or greater experience than the delegate replaced.

PLEASE NOTE: Full Payment is required in advance of conference. Please make cheques payable to Mindpath corp.

Directions from Toronto:

1. Take Highway 400 North past Barrie (~ 100 kilometers)
2. Take the 400 Extension North 2 kms past Parry Sound (~ 125 kilometers)
3. Turn right onto Highway 124 East to McKellar (~ 20 kilometers)
4. Turn right onto McKellar Centre Road (at the Kwik Way Store)
5. Follow McKellar Centre Road to CAMP Road (~ 5 kilometers)
6. Turn right onto CAMP Road
7. After about 1 kilometer turn left onto INN Road
8. Follow the INN Road for about 1 kilometer to the Entrance Gate

For more information about the conference, contact Lois DuVal e:duval@Mindpath.ca or Dan Jerred e: jerred@Mindpath.ca or call (416) 929-MIND (6463). To become a conference sponsor, contact Dan Jerred at (416) 768-PATH (7284).

