LORING WARD
A BETTER WEALTH EXPERIENCE

NEWS

For Immediate Release

William Chettle
Loring Ward
PH: (646) 285-4783
wchettle@loringward.com

Loring Ward to Host 23rd Annual National Education Conference

Top Advisors Will Hear from All-Star Line-up of Innovative Business Strategists, Communication Experts and Experience Specialists

San Jose, Calif. (August 14, 2017) Loring Ward is holding its annual National Education Conference September 17-19 at the Broadmoor Hotel in Colorado Springs, CO. Approximately 175 select advisors will join Loring Ward employees and financial services experts, to explore the tools, technology, practice management and best practices advisors can use to help deliver more value to their clients through every phase of life.

“We always put a lot of focus on actionable strategies and best practices for delivering a great client experience,” said Loring Ward Vice President, Erich Reinhardt, who is responsible for putting the conference together. “But this year, we have decided to center the agenda almost exclusively on experience. We believe that the most successful advisors in the future will be those who provide exceptional client experiences.”

Attendees at the Conference will hear compelling main stage presentations from the following special guest speakers:

Bernie Clark, Executive Vice President and Head of Schwab Advisor Services, shares his views on the future of financial services, from technology to cybersecurity to working with millennials and Gen Xers.

Frank Luntz, Founder/Chairman of Luntz Global, explores the specific words and phrases that build (and destroy) client-advisor relationships and shares a step-by-step approach that helps build and maintain client trust and confidence.

Joe Navarro, speaker, educator and author of “The Spycatcher,” brings his expertise as a former FBI supervisor in counterintelligence and counter-terrorism to help Advisors effectively recognize and decipher non-verbal communication.

Chip Roame, Managing Partner at Tiburon Strategic Advisors, provides perspective on financial services trends impacting business, consumers and the financial services industry, including robo-advisors, reaching digital consumers and advancements in financial planning.

Dennis Moseley-Williams, Experience Economy Specialist, shares his insights on how to design a client experience and grow in an era of unprecedented change.

Breakout sessions will allow attendees to take a deeper look at important topics such as investment management, how to differentiate yourself as a retirement advisor, growing through marketing, college planning best practices and succession planning for entrepreneurs.

We will also hold a special interactive Experience Walk featuring insights and best practices for each area of the client advisory process, as well as demos of supporting tools and technologies.

For additional details, please visit www.loringward.com/NEC.

About Loring Ward

Loring Ward (LWI Financial Inc.) is committed to creating a better wealth experience for Financial Advisors and their clients across the U.S. For over 25 years, the firm has strived to do this by empowering Advisors with Investment and Advisor Solutions that can help increase the probability of delivering a great experience for their clients.

We have a large network of independent Advisors in the United States and are located in Silicon Valley, California.

Loring Ward's Asset Class Investing philosophy is based on more than nine decades of data, analysis and research, insights from behavioral finance, and close relationships with leading academics, including Loring Ward Investment Committee Members Dr. Meir Statman and Nobel Laureate, Dr. Harry Markowitz.

As of August 7, 2017, Loring Ward has $15.6 billion in assets under management. For more information, please visit www.loringward.com.

All named third party companies are unaffiliated with LWI Financial Inc.

Charles ("Chip") Roame is an independent trustee of the SA Funds Investment Trust, an investment company. The SA Funds are sponsored by LWI Financial Inc and distributed by Loring Ward Securities Inc.