

NEWS

For Immediate Release

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Loring Ward Hosts 23rd Annual National Education Conference

Focus on Experience as Top Advisors Hear from All-Star Line-up of Experts

San Jose, Calif. (October 5, 2017) Loring Ward held its annual National Education Conference September 17-19 in Colorado Springs, CO for almost 200 independent Advisors. The Conference focused on insights and best practices to help Advisors enhance their client experience and deliver more value to clients at every phase of life.

Conference attendees heard compelling main stage presentations, including from **Bernie Clark**, Executive Vice President and Head of Schwab Advisor Services, on how to build stronger client relationships; **Frank Luntz**, Founder/Chairman of Luntz Global, on developing more effective messaging; **Joe Navarro**, speaker, educator and author of “Louder Than Words,” on understanding non-verbal communication; **Chip Roame**, Managing Partner at Tiburon Strategic Advisors, on why there has never been a better time to be a financial advisor; and **Dennis Moseley-Williams**, Experience Economy Specialist, on the importance of creative transformative client experiences.

One of the highlights of the conference was a special interactive **Experience Walk** that featured a display of the Office of Tomorrow, insights and best practices for each area of the client advisory process, presentations from Advisors and demos of supporting tools and technologies. According to Erich Reinhardt, VP of Advisor Relations with Loring Ward, “The Experience Walk was grounded in our belief that delivering an exceptional client experience built around a comprehensive and consistent client advisory process, will be the hallmark of great Advisors.”

During the Conference, Loring Ward also presented Loring Ward Chairman and founder, Alan Werba, with its Heritage Award. Past winners of the Loring Ward Heritage Award include David Booth, CEO and Founder of Dimensional Fund Advisors, Dan Wheeler of Dimensional Fund Advisors (retired), and John Bowen and Carl Reinhardt, Loring Ward’s other two founders.

“I can say unequivocally that we would not be sitting here in this room without Alan Werba,” said President and CEO Alex Potts. “Alan is the ethos of our company. It is what he does for his clients every day that inspires and guides us at Loring Ward.”

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 October 5, 2017, Loring Ward has \$16.2 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.

LWI Financial Inc. ("Loring Ward") is an investment adviser registered with the Securities and Exchange Commission. Securities transactions are offered through its affiliate, Loring Ward Securities Inc., member FINRA/SIPC. R17-214 (8/19).