

Advisor Microsite Launch: Design Elements and Logo and namebadges





IT TAKES A VILLAGE
BY THE SEA... >

CONGRATULATIONS ON QUALIFYING FOR
COMMONWEALTH'S 2016 WINNERS CIRCLE!

REGISTER NOW 

JOIN US MAY 22 – MAY 26, 2016, IN CARLSBAD, CALIFORNIA.

Please register by Month 1, 2016. 

SCHEDULE & ACTIVITES

Sessions, social events, and adventures for you and your guests, right at your fingertips

DOWNLOAD THE AT-A-GLANCE ACTIVITIES SUMMARY TO HELP YOU PLAN YOUR FAMILY'S DAILY EXCURSIONS 



ADULT SCHEDULE 



CHILDREN'S SCHEDULE 

PLANNING YOUR TRIP

Travel logistics, hotel details, and useful tips to help you make the most of your visit

TRAVELING TO GUANACASTE

YOUR STAY

GUEST POLICIES AND FEES

 HOW TO BOOK YOUR TRAVEL

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Microsite Launch:
Design Elements
and Logo

The screenshot shows the homepage of the Business Experience Commonwealth 2017 microsite. At the top, there's a banner with a colorful mural of a woman's face and the text "EXPAND THE SCOPE OF YOUR BUSINESS". Below it, a message says "Congratulations on qualifying for 2017 Business Experience!" with a "REGISTER" button. A green box below that says "Join us May 22-25, 2017 at The Ritz-Carlton in San Francisco, California." with a small building icon and "PLEASE REGISTER BY MONTH XX, 2017.". The main content area has sections for "DAYTIME ACTIVITIES", "FEATURED SPEAKERS" (with two headshots), "AGENDA", "EVENING EVENT" (with a photo of Alcatraz), and "PLANNING YOUR TRIP". Each section includes sub-headings and "View" buttons.

Internal Wholesaler Mailing 2017: Print Piece and labels

The print piece features a large title "BEFORE YOU GET BRAIN FREEZE, TEST YOUR ICE CREAM KNOWLEDGE!" in blue and green. It includes a logo for "COMMONWEALTH FINANCIAL NETWORK" with the tagline "Sweet Dreams Are Made of These". The page is filled with ice cream-related facts and illustrations. At the bottom, there's a section titled "LABELS — NYE'S ICREAM SANDWICHES" showing five circular labels for different ice cream sandwich flavors: Peach Crisp, Peanut Butter Chocolate, Coconut Chocolate, Vanilla Chocolate, and Banana Nut Chocolate.

Email template for CommonWell

MARCH 2017

ARTICLE HEADLINE HERE

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For Internal Use Only

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Advisor Live Logo and Branding



Commonwealth Advisor L I V E
The basics of building a book of business

COMMONWEALTH
ADVISORLIVE
THE BASICS OF BUILDING A BOOK OF BUSINESS

Commonwealth Advisor L I V E
The basics of building a book of business



COMMONWEALTH
ADVISORLIVE
The basics of building a book of business

COMMONWEALTH financial network

COMMONWEALTH
ADVISORLIVE
The basics of building a book of business

COMMITMENT AGREEMENT

Please sign and return this agreement letter no later than **XV/XX/XXXX**, to Christin Clobosey at clobosey@commonwealth.com or fax it to 781.398.9976.

I am electing to participate in the Commonwealth Advisor Live program.

In doing so, I agree to:

1. Come prepared for and ready to actively participate in the scheduled workshop:
August 23–25, 2016, Commonwealth Home Office, Waltham, MA
2. Complete and submit pre-workshop and post-workshop implementation assignments

I understand that my name and contact information will be made available to other participants in the group unless I request otherwise.

I understand that \$1,500 will be deducted from my July 2016 month-end compensation run. Upon successful completion of the program, I will be credited up to \$750 on my end-of-year compensation run for 2016. I want to apply this charge to advisor ID: _____
All travel-related expenses are my responsibility.

Signed: _____ (e-Signature accepted)

Printed name: _____

Date: _____

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COMMONWEALTH financial network
FM-3754-32502_05/16

Posters: InfoSec Cybersecurity Awareness Course



Cybersecurity Awareness Month marketing collateral:
CommonSense "Phishing" Packet Design



Commonwealth's Storage & Backup Solution:

Type treatment for Commonwealth Storage & Backup Solution that can:

1. Use to create labels for hardware that is set up for advisors on-site
2. Digital file to use with online marketing material.

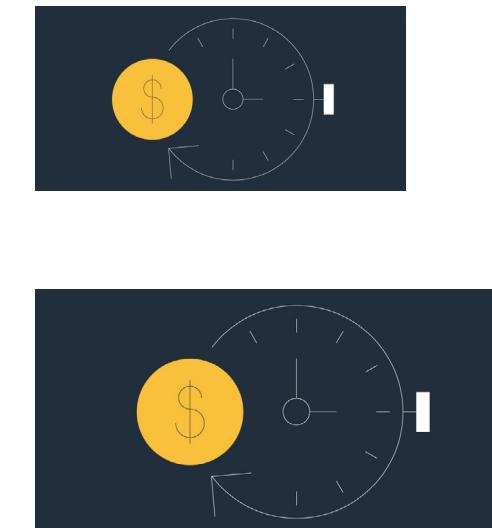


Summer/Spring Postcard Mist: First of two annual postcard mist to leads





Inbound Marketing: Blog Images—Facebook, LinkedIn, Twitter



Commonwealth Independent Advisor

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5 Questions to Ask When Reviewing Your Book of Business

Posted by Maria Considine King

May 5, 2015 at 10:00 AM

I'm a first-generation Scot, and one of the common phrases from my childhood was "to be at sixes and sevens." My mother would say it when I seemed at odds with myself—unsure what to do next or confused by my choices. The remedy was to review my priorities and decide on the next step.

In business, you certainly don't have to get to "sixes and sevens" before reviewing your priorities! Instead, consider using regular milestones (e.g., quarter's end) to determine if you're on track. To aid in this process, I've compiled questions to ask when reviewing your book of business. Since your roster of clients is likely your main priority, evaluating your book can be a particularly enlightening and effective exercise—one that can, in turn, lend clarity to other initiatives.

1) How Many Clients (and Accounts) Do You Have?

A general rule of thumb is that one advisor can comfortably handle 150–175 household relationships.

If your book is larger than that, you run the risk of overextending yourself and your staff on service issues. This may limit your ability to:

- Nurture existing client relationships
- Offer additional or higher-touch services
- Grow the practice

If your book is smaller than 150 households, it's likely that you put the quality of your client relationships above all else. The downside to this tactic is that you may be trying to do too much to keep your clients happy. The effort you put into your existing relationships is unlikely to be scalable and may actually inhibit growth.

But no matter the size of your book, being able to scale your services is critical to growing your business. And to achieve scale, it's necessary to categorize your clients.

2) Have You Categorized Your Book into A, B, and C Clients?

If you haven't yet started the process of categorizing your clients, you can begin by creating an ideal client profile to pinpoint the type of client that will contribute to your business's growth. You'll want to consider the various attributes of "your ideal client":

- Planning needs
- Assets under management (AUM)
- Annual revenue generated

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With ever-rising tuition at both public and private universities, many of your clients likely spend a lot of time thinking—and worrying—about how they'll pay for their children's higher education. At the same time, these clients may also be struggling with meeting their own retirement savings goals. And that's exactly where you come in. As the trusted advisor, you can help clients with education planning by laying out the facts when it comes to the true cost of college, plus strategies to keep their savings on track.

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Topics: [Education Planning](#)

A New Reality for Advisors: Responding to the Death of Clients

Posted by Joni Youngwirth

August 30, 2017 at 1:30 PM

In a sign of changing times for our industry, the oldest baby boomers reached age 70 in 2016. What does this mean for financial advisors? Over the next decade and beyond, it's likely that you'll find yourself attending to the needs of grieving survivors, as well as responding to the death of clients. Do you have a plan for how your firm will deal with this new reality?

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Topics: [Practice Management](#)

The Multi-Pay Linked-Benefit Policy: A Long-Term Care Game Changer?

Posted by Susan Kobara, CLTC

August 29, 2017 at 10:00 AM

I'm getting older. You're getting older. Your clients are getting older. Such is life! But, perhaps more important from a planning perspective, we are all living longer than previous generations. As such, you may counsel your clients to take various steps, including delaying retirement, deferring social security benefits, withdrawing savings at a lower rate, or considering more retirement-focused products.