

Are you a  
**SEASONED VETERAN**  
in the Financial services industry?

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**Are you full of the type of wisdom, knowledge and advice that could've helped your career when you were just starting out? Do you already have an exit strategy, or succession plan?**

Some day you'll need to retire, and transition out of your practice. You might sell it, pass it on to family, or just walk away; But whatever you do, you must have a plan. Maybe you are looking for the right young partner to bring in under your wing, and groom to take over your legacy. Do you ever wonder how much more you could get done with an up-and-comer who could follow up on all the leads you don't have the time to work, or to deal with the products you don't want to sell? Maybe you just need a forum in which you can talk to others who have already implemented plans like yours.

Are you a  
**young prodigy**  
in the financial services industry?

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**Are you beginning to master the skills you need, but could still use some guidance and coaching? Do you have plenty of energy and motivation, but have a hard time figuring out better markets, or knowing in which direction to grow?**

Right now, you either need to find a way to succeed in this business, or find a more efficient way to get a leg up on the competition. You know that you can succeed if you can make it through a few more hard years, and you know that you are willing to put in the hard work. Are you open to mentoring, but don't know where to look to find someone who is willing to help? Maybe you have already found a partner who is willing to transition you into, or sell you their business, but you want to make sure that the agreement is sound.



NAIFA Portland & NAIFA Northwest jointly host  
a focus meeting on The Young Advisors Team



Three different partnerships will be discussing the choices they've made and the trials they've faced in developing strong mentoring relationships and succession plans.

March 11, 2009 11:30 - 1pm

\$10 (includes lunch)

The Old Spaghetti Factory  
0715 S.W. Bancroft St.  
Portland, OR 97239

RSVP online: [www.naifanet.com/oregon](http://www.naifanet.com/oregon)

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