

Foundations for Success

**Acquiring, maintaining &
building your client base**

June 24th, 5:45 pm

Beer & Pizza 5:45 - 7:45pm

@ McMenamins Crystal Ballroom

In the Lola's Room

1332 W Burnside St., Portland, OR 97209

NAIFA's Young Advisor Team presents:

Peter Montoya

Nationally acclaimed author and speaker on marketing and branding for financial professionals will teach how to create and maintain a client communication program

Ben Davis, DIBroker

The Art of Cold Calling

Robert Kennedy, Woodbury Financial Services, Inc., Member FINRA, SIPC

Developing a Referral-based Practice

YAT/NAIFA members \$20 - Non-Members \$30

For broker-use only. Register@ www.naifanet.com/oregon

Or register/pay via mail:

NAIFA-Oregon, 12690 NW Lorraine Dr, Portland, OR 97229