

NEWS

For immediate release

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Advisor Thought Leader Summit Slated for August 2019

*Pam Krueger of PBS Fame to Headline
Interactive On-Camera Media Training at Rockhurst
University in Kansas City*

June xx, 2019 [Kansas City, Mo.] – Long-time financial services marketing and PR consultants Maribeth Kuzmeski, PhD (www.RedZoneMarketing.com) and Marie Swift (www.ImpactCommunications.org) are for the second time in less than twelve months joining forces to bring the Advisor Thought Leader Summit (www.AdvisorThoughtLeaderSummit.com) to a select group of tenured financial professionals. The event – which is being billed as an interactive workshop and “media training on steroids” – will take place August 12-13, 2019 at Rockhurst University (<http://www.rockhurst.edu/>).

Broadcast professional Pam Krueger (www.PamKrueger.com) will personally coach and interview all participants, helping them to reach their full potential as a financial services professional. Krueger is creator, co-host, and executive producer of MoneyTrack (www.pamkrueger.com/pbs/), a half-hour TV series about personal finance and investing that has aired on 255 Public Broadcasting Service public television stations nationwide. She is also the founder of Wealthramp (www.Wealthramp.com), a web service that matches consumers to fiduciary financial advisors.

Krueger recently recorded this short [webcam interview](#) with Marie Swift as a way to share some preliminary tips and insights.

“If you are ready to move beyond being quietly competent and credible to *standing out as a celebrity of sorts* with your clients and centers of influence, then you simply **MUST** join us for this two-day experience,” said Swift. “If you have ever looked at a newspaper, magazine or broadcast segment featuring

a competitor and said to yourself: ‘How is it that this person is getting all this great publicity instead of a professional like me?’ know that this highly-focused, power-packed summit could provide this missing piece.”

“There’s a formula for becoming a thought leader – which includes being great in front of the camera – and we will not only provide you with that formula but help you create your own video and other important elements as we move through the Advisor Thought Leader Summit agenda,” said Kuzmeski.

Kuzmeski and Swift recently recorded this short [webcam interview](#) to provide additional thoughts and details.

THE CELEBRITY PLATFORM DAY: AUGUST 12, 2019

“The first day of the summit is about helping advisors overcome their marketing paralysis, and articulate their value – which is, ultimately, the biggest thing that distinguishes them from their competitors,” said Kuzmeski. “The morning of day one will focus on all the strategies for standing out in a crowded field – everything from the words the advisor uses, to the right attire, hair and makeup, to the power of passion, body language and camera skills.”

Topics for the day include:

- Developing Your Messaging and Credibility Theme
- How to Build a Credibility Platform – and Why
- Becoming a Sought-After Media Source
- Creating Your Own In-Office Video Studio
- Hot Seat Coaching for a Few Brave Souls
- Camera-Skills Training for One and All

“We’ll be using an interactive workshop experience all day long,” added Swift. “Our goal is to get the advisors engaged and actually DOING some of the work that needs to be done if they are to truly step into the spotlight. When they get home, they will have more than just new know-how – they will have the additional experience gleaned from hotseat coaching, group interaction, faculty presentations and actually recording a Thought Leader interview with Pam Krueger. They will have lots [photo opportunities](#), too. The photos and video will be very appropriate for use on social media and in the news release we’ll help them craft about their participation.”

[Here’s an example of a news release published by one of the Thought Leader participants in 2019: Veteran Retirement Experts at Stearns Financial Group Offer Insights on Mars and Venus of Retirement.](#)

“Another element that’s new and exciting at this particular Advisor Thought Leader Summit is that we will be inviting financial professionals who have successfully created their own credibility platform to share how they did it – and how everyone else in attendance can, too,” Kuzmeski said. One of the financial advisors who agreed early on to share her success formula is Zaneilia Harris, CFP, founder of H & H Wealth Management (www.HHWealth.com). A member of CNBC.com’s Advisor Council, Harris was recognized in 2013 as Washington, D.C.’s People Choice for Wealth

Management. She was the 2012 recipient of the Financial Planning Association's Diversity Scholarship Award. Most notably, her blog – Finance 'n Stiletto – was recognized by *Investment News* as one of the best blogs for women and investing. A recent opinion piece was published by *Financial Planning* magazine. Her previous experience includes positions with Merrill Lynch, Edward Jones Investments, PricewaterhouseCoopers and The NASDAQ Stock Market.

“It’s important to understand your personal story,” Harris explained when asked why she was excited to be participating at the 2019 Advisor Thought Leader Summit. “What do you want to communicate about who you are? What makes you different? When people connect to your story, it makes it easier to connect to you as a financial advisor. I think as financial advisors and planners, we may be comfortable speaking directly to individuals, but we have to overcome some of our fears of being in front of a camera. That’s part of what’s so great about this summit – you actually get video interview experience. Ultimately, what you’re trying to do is find your ideal client, and connecting well on-camera is a large part of that,” said Harris.

Harris shares additional thoughts about the value of building a credibility platform in a recent [webcam interview](#) with Marie Swift.

“A lot of advisors have all this knowledge, all of this intellectual capital...but communicating that in video is very difficult. On video, we have to be the very best we are...at that exact moment. Our team at the Summit will guide and instruct to make sure the sound is exactly right, the lighting is perfect, and the words and delivery are the very best they can be,” added Swift.

Krueger, a television producer and co-anchor with over 20 years of experience, will coach and guide each participant throughout the day, helping to hone their brand and position them as a thought leader. Krueger will do an on-camera interview with each attendee. Everyone will receive their own short Thought Leader Interview as a video asset.

Three examples of shorter Thought Leader videos from last year’s Advisor Thought Leader Summit include:

- [Matt Jones, Principal, Legacy Capital, Littlerock, AR – Thought Leader interview with Angie Larsen](#)
- [Haleh Moddasser, Partner, Stearns Financial Group, Greensboro, NC – Thought Leader interview with Angie Larsen](#)
- [Susan Zimmerman, Partner, Mindful Asset Planning, Minneapolis, MN – Thought Leader passion statement](#)

“We’ll celebrate the conclusion of day one with drinks and a catered reception right before getting a good night’s rest as we cast our vision toward day two,” Kuzmeski said.

THE PREMIER ADVISOR DAY: AUGUST 13, 2019

“Day two is extra special,” said Swift. “Several advisors will be prepared – through pre-event coaching and scripting with us – to record a Thought Leader Talk. This is our version of a TED Talk, where the advisor will, first and foremost, talk about *why* they do what they do. We’ll have a professional on site to help with hair and make-up, and set times for each presenter, who can use a PowerPoint, note cards, bullets

on an iPad or a teleprompter – and our on site coaching – to deliver the perfect speech to the audience of peers assembled. Each video will be professionally produced and sent to the advisor after the conference; we are including one round of edits, if needed, based on compliance review.”

Three examples of longer Thought Leader Talks from last year’s Advisor Thought Leader Summit include:

- [Making Smart Retirement Decisions: Haleh Moddasser and Dennis Stearns of Stearns Financial Group](#)
- [Preparing Well for a Longer Life: Jeanne Carlson Smith of Marca Life Planning](#)
- [Making the Complex Simple: Matt Jones of Legacy Capital](#)

“There is no extra charge to stay and watch,” added Kuzmeski. “While we hope everyone signing up for day one will also want to sign up for the additional Thought Leader Talk on day two, we realize not everyone is going to be ready for that right now. It does add to the price of participation – which is still an incredible great value. But in reality we can only fit ten of these Thought Leader Talks into the time we have available on day two.”

THOUGHT LEADER FACULTY ADDS VALUE

In addition to learning from [Kuzmeski and Swift](#), advisors will spend time learning from Pam Krueger, creator, co-host, executive producer of [MoneyTrack](#), a half-hour TV series about personal finance and investing that has aired on 255 Public Broadcasting Service public television stations nationwide.

Leading the session on How to Create Your Own Credibility Platform is Zaneilia Harris, H&H Wealth Management, the author of the book, [Finance ‘n Stilettos – Money Matters for the Well-Heeled Woman](#), member of the CNBC Financial Advisor Council, a financial educator, blogger, and CERTIFIED FINANCIAL PLANNER™ who is passionate about finances and sharing her expertise with other women so they can become financially savvy.

Additional QuickTake presenters will be announced in July.

“One of the big benefits of being a part of The Advisor Thought Leader Summit is getting to *spend time with* and learn from these credibility experts,” Swift said. “A quick skim of the faculty page will show exactly how they ‘walk their talk.’ These experts were hand selected to serve as Advisor Thought Leader faculty not just because they know their stuff, but because they also *live their brands* and have created their own credibility platforms. You might even say they are celebrities in their own right.”

“Another big benefit of coming to The Advisor Thought Leader Summit is that you will be visible and in the presence of these thought leaders through social media posts, photos, your special video interview(s) that you can place on your website, and the news release we will help you customize and syndicate online. You will enjoy an instant halo effect! As the old saying goes, ‘we are known by the company we keep’ and in today’s transparent, digital world, that saying is truer than ever before,” Kuzmeski adds.

“Rather than just picking some television has-been or political figure to come for a speech and

provide some photo ops to the participants, these professionals will enhance your personal brand,” Swift asserts.

The evolving faculty page is available here: www.AdvisorThoughtLeaderSummit.com/Faculty.html

PURPOSE-DRIVEN LEADERS

“I’ve long dreamed of producing an event like this where advisors come together to learn not just from the experts but from their advisor-peers,” said Swift, “and where advisors not only learn but actually get some work done – instead of just going home with knowledge that typically fizzles and doesn’t really take root due to staff and client demands. When Maribeth and I got to talking about my thought leader summit idea in November 2017 while at another industry conference, we realized just how much better it would be if we did it together. So here we are – creating what we believe is a one-of-a-kind event together. Maribeth is a thought leader in her own right and I am so very pleased to be working with her on this special project.”

“When you get right down to it, The Advisor Thought Leader Summit is really more of an experience with a solid slate of deliverables than it is a traditional conference or workshop,” Kuzmeski adds. “You will leave with your clarified value, and many digital assets to spread the word!”

REGISTER BY JULY 4TH AND GET EVEN MORE VALUE

Two exciting Early Bird incentives are also available:

- Impact Communications will provide a **personalized Media List** for the registrant’s city’s media outlets to use as their own. This special bonus for Early Birds will help participants act on the advice they will be receiving at the event on how to share with the media their customized news release, photos and videos that will be produced as a matter of course at the Advisor Thought Leader Summit in August.
- Red Zone Marketing will provide a **pre-conference phone call** with each participant to provide guidance for clarifying their value proposition. This will give Early Bird registrants a head start on creating the best digital assets for their firm while at the Advisor Thought Leader Summit in August.

Registration is open now: <https://www.AdvisorThoughtLeaderSummit.com/Registration.html>

ABOUT THE ADVISOR THOUGHT LEADER SUMMIT

The Advisor Thought Leader Summit is being billed by the organizers, [Marie Swift](#) and [Maribeth Kuzmeski](#), as “an experience you’ll never forget.” In order to create a more powerful, interactive experience, the Advisor Thought Leader Summit will be open to a small group of financial advisors, only. This exciting two-day summit will provide much more than just learning, information and insights. Through individual and group coaching, participants will learn how to work with the mainstream media and position themselves as the go-to source when it comes to personal finance and investment strategy. They will learn how to improve their personal presence and presentation skills – including what to wear and how to be on camera – as well as how to communicate, verbally and in

writing, in a more powerful and compelling way. Faculty will also talk about benefits of writing a book or building a credibility platform based on a thought leadership blog, how to come up with content that inspires interaction, and much more. Importantly, every participant will walk away with a suite of digital assets to use on their website, in email campaigns and on social media.

To view the full list of deliverables and other pertinent information, visit:
www.AdvisorThoughtLeaderSummit.com.

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