



The Credibility-Building Platform EXPERIENCE  
for Financial Advisors

## PREPARING FOR THE ADVISOR THOUGHT LEADER SUMMIT

### Monday, August 12

- 1. 2-minute Thought Leader Video Interview:** Think about the questions you want our television personality to ask you during your interview. **Bring your questions on a piece of paper or hand her your smartphone / iPad with your questions displayed.** Pam will run through them with you and put you at ease.
  - a. Ideas for questions:**
    - b. Tell me about your company/firm. What makes it unique?
    - c. Tell me about you. Why do you do what you do? Who do you serve and why?
    - d. How did you become a financial advisor? What led you to this place in your career?
    - e. What's one thing your clients know about you and/or your firm that prospective clients don't know -- but should?
    - f. Do you have any interesting hobbies or passion projects you'd like to share?
- 2. What to Wear:** Wear solids as a general rule. The camera loves all shades of blue including navy, royal and baby blue. Can't go wrong with an off-white shirt or baby blue shirt for men under a dark jacket.
- 3. Informal Dinner Sunday Night:** If you are interested in meeting up for an informal dinner and/or drinks stop in starting at 6:30pm Sunday, August 11 at **Rye** (On the Country Club Plaza)  
<https://ryekc.com/plaza/#contact>
- 4. Coordinate Rides from Airport:** If you would like to coordinate rides to/from the airport, click here to add your information and/or to look for others arriving/leaving at the same time.  
[https://docs.google.com/spreadsheets/d/1zhy5EyiRC4XMGaMFDnb6RTEkGoxTQnm\\_J2Tnu9nmGLA/edit#gid=0](https://docs.google.com/spreadsheets/d/1zhy5EyiRC4XMGaMFDnb6RTEkGoxTQnm_J2Tnu9nmGLA/edit#gid=0)
- 5. Monday Morning!** Show up rested and ready to go at 7:30 am. We'll have a continental breakfast as well as coffee, tea and water available all day. The full agenda can be found here  
<https://www.advisorthoughtleadersummit.com/agenda.html>  
**Event Location: Rockhurst University, Science Center, 3<sup>rd</sup> Floor Lecture Hall**
- 6. DIRECTIONS:** On Monday morning, you will need to grab an Uber/Lyft to Rockhurst University (a 10-minute drive each way):
  1. Tell the Uber/Lyft driver to **\*\*enter the campus on 54th Street\*\*** (off Troost). You will see the Rockhurst signage and the Rockhurst Community Center building right there at the **SOUTH** entrance to the campus.
  2. Follow the road around past the guard house (if manned, tell them you are coming to a special event at the Science Center). Park anywhere right there.
  3. Walk down the promenade to the first big building on your left (the Science Center).
  4. Come in through the main door of the **Science Center (big white modern-looking building)**. Find the elevators or the stairs at the end of that long hallway. Come to the **3rd floor** where you will see our registration table and smiling faces.

7. **Lunch** will be provided mid-day on Monday, August 12.
8. **Monday Night Dinner – Complimentary - hosted by National Advisors – 5pm:** Join us for cool beverages and a nice Kansas City BBQ dinner! Jim Combs, CEO of National Advisors, and his team will host us at their spacious Kansas City headquarters. *Transportation will be provided from Rockhurst University to the dinner location.*

## **Tuesday, August 13**

**8am Tuesday Morning for Premier Advisor Day:** Separate instructions and coaching have been provided to those who have registered to record longer Thought Leader Talks. Please eat breakfast on your own and arrive with coffee or water in hand, as you wish. Hair and makeup start at 8:00 am and you can bring your own supplies if you wish. The first shoot starts at 8:30 am. We will be in the same room as Day One: Rockhurst University, Science Center, 3rd Floor Lecture Hall.

**Additional Updates:** Be sure to check the agenda on the website for other exciting news and additions to the program. <https://www.advisorthoughtleadersummit.com/agenda.html>

**See you soon! Share on social media that you will be attending!!**

**For urgent matters please call:**

- Marie Swift: 913-961-4030 (smartphone)
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- Maribeth Kuzmeski: 847-309-4971 (smartphone)