Tap Into the Recession-Proof Market of Federal Employees in Your Local Area

While the nation is faced with widespread unemployment, the federal government is hiring. This is just one of the many reasons this is a prime niche market for financial professionals to be in today.

Why is this an ideal niche market to focus in?

Although federal employees receive a generous benefits package including a pension, their financial preparedness for retirement is often lacking.

- Only 15% of federal employees are located in the Washington DC area. The other 85% are primarily concentrated in medium to large metropolitan areas around the country.
- Fewer than 50% have actually calculated how much they need to save for a comfortable retirement, and only 25% of federal employees have ever worked with a financial professional.
- Nearly 40% are not confident about their ability to make investment decisions, and fewer than 20% believe they have a great deal of knowledge of investing.

Of the roughly 2 million federal employees, about half are either eligible to retire today or within the next 5-10 years, and are looking for a safe and secure place for their money.

Where are your sales opportunities?

You'll have many ideal opportunities to recommend commercial products that offer more flexibility and control to federal employees than the government options allow.

- Hundreds of thousands of federal employees have substantial savings in their Thrift Savings Plan—a 401(k)-style account—that they can readily roll into other investment or annuity alternatives you may offer.
- Also, the majority of federal employees have employer-sponsored insurance products such as life, and long-term care that offer little customization at a high cost.

What you need to get started:

Get the proven tools and training you need to become the go-to financial professional for federal employees in your local area.

- Attend the ProFeds Business Building Bootcamp on August 2-3, 2010 in Kansas City.
- The Bootcamp is conducted by the federal market's leading trainer and expert, Chris Lennan, who will share with you proven strategies for financial professionals working with federal employees.
- **Register for the ProFeds Bootcamp today by completing the enclosed registration packet.**

REGISTER TODAY!

ProFeds Business Building Bootcamp

August 2-3, 2010 in Kansas City, MO

Meet Your ProFeds Coach and Trainer

About Chris Lennan

Chris Lennan is a nationally recognized federal employee retirement benefits expert, and a frequent trainer for federal employee organizations and financial service firms throughout the country. She brings nearly a decade's worth of experience in the financial services industry and is the most trusted expert among financial professionals serving federal and postal employees.

As the developer of dozens of highly-regarded retirement planning materials for federal employees, Chris has also analyzed the challenging retirement scenarios for several thousand federal employees – helping them to avoid costly mistakes, and highlighting opportunities for them to gain greater financial security in their retirement years.

> ***"Her years of field experience working directly with advisors have prepared her very well to become the premier expert at bridging the gap between the federal market and the advisor."***
> ***Don Marcum from Fort Worth, TX***

Bringing extensive experience in one-to-one coaching, providing solutions to hundreds of challenging benefits cases, and conducting dozens of inspiring live training events – Chris has helped equip federal employees with confidence to make sound retirement planning decisions. That confidence is based on a clear understanding of how the benefits work, how they apply to the employee, and what financial impact the employee will feel from his or her decisions.

Because of Chris' background in the financial services industry, she knows first-hand the challenges that so many face as they plan for and approach retirement. She believes that helping employees to take ownership of their decisions—or lack of decisions—is the first step to meet their specific retirement goals.

While federal benefits are often confusing and difficult to interpret, Chris is able to breakdown complex concepts into easy-to-understand language to help financial professionals show employees how proactive benefit decisions can positively affect their overall financial situation.

About ProFeds

ProFeds is a nationwide support structure for financial professionals serving federal employees. The ProFeds team provides tailored training to financial professionals on the unique complexities of federal employee benefits, and how those benefits work into an overall financial plan.

> ***"I've found my niche! Thanks to ProFeds, I can stay focused on profitability and provide each client with what they want and need— specific financial analysis and planning."***
> ***Brandon Christy from Macon, GA***

The specialized training allows the financial professional to truly understand how the benefits behave, the unintended consequences of certain decisions, and the limitations of what the government benefits can provide. This helps them to provide credible, top-notch financial planning services to their federal employee clients with their specific benefit options integrated into their overall financial strategy.

Join us Aug 2 – 3, 2010 in Kansas City

Business Building Bootcamp

Proven Strategies For Financial Professionals Working With Federal Employees

Customized training exclusively for financial professionals

This unique training course expands beyond technical benefits training to show financial professionals how to conduct more profitable meetings with every federal prospect and client, identify key sales opportunities, and leverage off of practical and proven tactics to help their clients make sound decisions.

Ideal candidates

Whether you have been in this marketplace for many years and looking for a boost in your business, or you're just beginning to make this market your focus—this may be just the program you've been looking for. We've included a healthy mix of ground-level training and more seasoned topics for the experienced planner looking to refine their meeting techniques and broaden their marketing plans.

Our training focus

Our rigorous 2-day agenda has been built around helping attendees to feel competent and confident working with federal employees, and how to build their business to serve the distinctive needs of this unique group.

Dates & Location

ProFeds will host the Business Building Bootcamp on August 2-3, 2010 near the Kansas City Airport. Kansas City is well known for their easy access airport, and the hotel is located on the airport grounds just a quick shuttle bus away.

Kansas City Airport Marriott
775 Brasilia Avenue
Kansas City, MO 64153
(816) 464-2200

Training dates and times
Aug 2nd: 9am—5pm
Aug 3rd: 9am—5pm

Pricing & Registration

Discounts are available for early registrations – register early and save $200.

Additional discounts are also available for current ProFeds members. A complete registration packet (including a course description, agenda, pricing and registration form) is available on our website at (www.ProFeds.com/bootcamp).

Questions?

Call 540.907.4490, ext. 2

Be confident working with federal employees

This unique training course expands beyond technical benefits training to show financial professionals how to conduct more profitable meetings with every federal prospect and client, identify key sales opportunities, and leverage off of practical and proven tactics to help their clients make sound decisions.

Financial professionals who have tapped into Chris Lennan's comprehensive training programs feel more prepared to take on the specific challenges of this marketplace. Whether you have been in this marketplace for many years and looking for a boost in your business, or you're just beginning to make this market your focus—this may be just the program you've been looking for.

Training Direction

While many federal marketplace training courses focus solely on the technical aspects of the federal benefits, what is critically important—and often overlooked—is for a professional to be fully equipped with how to apply this information in the context of a financial plan or other services they offer, how to explain complicated topics to their clients in simple terms, and ultimately become the go-to person for federal employees to turn to for financial guidance.

Course Objectives

- Extensive coverage on federal employee programs such as their group term life insurance, 401(k)-style retirement plan, employer-sponsored long-term care coverage, health benefits, survivor's benefits and computing federal pensions.
- Comprehensive review of industry best practices and Chris Lennan's proven model for scheduling meetings, gathering necessary information, conducting appointments, and converting federal prospects into long-term financial planning clients.

To enhance your training experience, we will incorporate:

- ✓ Meeting demonstrations and classroom role play exercises
- ✓ Needs analysis and risk tolerance integration
- ✓ Commercial product concepts and application
- ✓ Leveraging industry-specific software programs
- ✓ Local events and advertising opportunities
- ✓ Strategies to grow a strong referral base

About your Coach & Trainer

As a trainer for several hundreds of financial professionals since 2001, Chris Lennan of ProFeds understands that there is simply no substitute for competence and confidence when working with a specialized niche like federal employees.

Beyond examining thousands of federal retirement benefit cases for financial professionals, Chris is also a nationally recognized federal employee retirement benefits expert, and a frequent speaker and trainer for federal employee organizations and financial service firms throughout the country.

Agenda

Let's face it—a training course about federal benefits doesn't sound all that exciting. Although we will have a rigorous training agenda, we will do our best to keep things light and entertaining.

We'll have plenty of breaks and opportunities for you to get to know one another. Take this time to explore other sides of the industry, market opportunities, or discuss various products and business models with fellow attendees.

Day 1: (9am—5pm)

- Introduction to the federal marketplace
- Civil Service Retirement System (CSRS)
- Federal Employee Retirement System (FERS)
- Federal Employee Health Benefit Program (FEHBP)
- Federal Employees Group Life Insurance (FEGLI)
- Federal Long Term Care Insurance Program (FLTCIP)
- Federal Thrift Savings Plan (TSP)
- 6pm: Hosted cocktails

Day 2: (9am—5pm)

- Local events and advertising opportunities
  - Ideal local marketing plan
  - Lunch and Learn concept
- Lead follow-through process and overall sales cycle
  - Defining your offer
  - Scheduling meetings
  - Setting expectations
- Sales Strategies and Best Practices
  - Familiarization with federal employee documents
  - Needs analysis and risk tolerance integration
  - Commercial product concepts and application
  - Strategies to grow a strong referral base
- How to conduct ideal 1st and 2nd appointments
  - Meeting demonstrations and classroom role play exercises
  - Leveraging industry-specific software programs
  - Review of a Sample Benefits Report
- ProFeds support structure and membership options
- 5pm: Departures to the airport

Business Building Bootcamp

Proven Strategies For Financial Professionals
Working With Federal Employees
Aug 2 – 3, 2010 in Kansas City

Registration Form

☐ **YES! Sign me up for the Aug 2 - 3, 2010 ProFeds' Business Building Bootcamp held at the Kansas City Airport Marriott.**
I agree to the cancellation policy below and understand that my credit card will be charged for the applicable registration fee upon receipt of this form.

REGISTER BY	YOU SAVE	YOUR COST
July 9, 2010	$200	$1397
Full price		$1597

Hurry—seats are limited—reserve your spot today!
ProFeds members—call for additional discounts.

ATTENDEE INFORMATION

Name: ____________________

Billing address: ____________________

City: ____________________ **State:** ________ **Zip Code:** ____________

Daytime phone number: ____________________ **Fax (optional):** ____________________

Email address [REQUIRED]: ____________________

PAYMENT INFORMATION

Circle one: VISA MasterCard American Express Discover

Card Number: ____________________ **Expire Date:** ____________

[IMPORTANT]: CVV2 code: ____________
The CVV2 code, also called CVC2, CID or CVN, is a 3-digit code located on the back of your card on the signature strip just to the right of the card number. For American Express, the 4-digit code is on the front of the card, just above and to the right of the embossed card #.

Name on Card: ____________________

CANCELLATION POLICY
All cancellations must be received in writing. Substitutions/name changes may be made at any time prior to the event without penalty. Cancel by: July 2, 2010 (100% refund), July 3 – 15, 2010 (75% refund), after July 15, 2010 (no refunds made). No refunds will be issued for no-shows, travel delays, missed sessions or cancellations after the start of the event. Enrollment fees include training and course materials only. Enrollee's food, accommodations, travel and other expenses are not included.

Questions?
Call 540.907.4490, ext. 2

Signature: ____________________ **Date:** ____________

Please fax this completed registration form to ProFeds at 866.779.9921.

Top 25 Areas for Federal Employees

Of the nearly 2 million federal employees, only 15% of them are located in the Washington, DC area—which means the other 85% are spread from coast to coast. Federal employees are primarily concentrated in medium to large metropolitan areas around the country.

San Diego, CA
Los Angeles, CA
San Francisco, CA
Denver, CO
Tampa, FL
Miami, FL
Atlanta, GA
Honolulu, HI
Chicago, IL
Boston, MA

Baltimore, MD
Detroit, MI
Kansas City, MO
St. Louis, MO
New York, NY

Dayton, OH
Oklahoma City, OK
Philadelphia, PA
Dallas, TX
San Antonio, TX
Houston, TX
Ogden, UT
Virginia Beach, VA
Seattle, WA
Washington, DC

Don’t see your area?
Let’s take a look!
540.907.4490 ext. 2