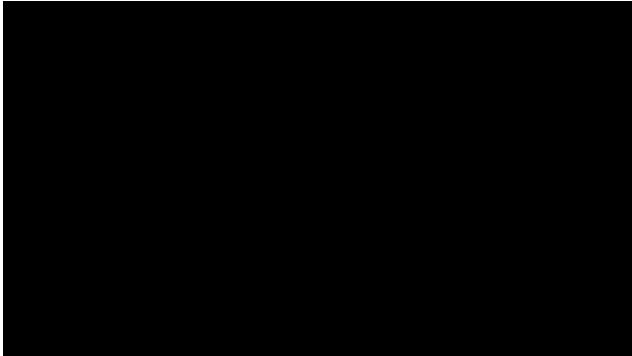




2019 MDRT Top of the Table Annual Meeting e-Handout Material

Title:	Leader 2 Leader: The Power of Growing Organically
Speaker:	Angie Herbers and Greg Gagne
Presentation Date:	Friday September 27, 2019
Presentation Time:	1:15 p.m.- 2:45 p.m.
Session Room:	Poppy

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Greg Gagne
Chief Executive
Affinity Investment Group LLC

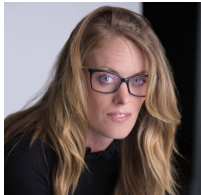
Greg is the founder Affinity Investment Group, LLC, a registered investment advisory firm, offering investment management and distribution planning services for retirees and those planning to retire.

Greg began his career in financial services shortly after earning his Bachelor of Science in Economics and Finance, from Bentley College in 1991. He became a Chartered Financial Consultant in 2001. He earned his RICP in 2016.

Mr. Gagne is a member of the National Association of Insurance and Financial Advisors. He served as President of his local association in 1999, as President of the State association in 2004, and served nationally on both the Committee of Associations and the Networking Task Force for NAIFA in the 21st Century. He was awarded the Distinguished Financial Advisor for NAIFA NH in 2008.

Greg has been featured in and writes for NAIFA's magazine "Advisor Today" and serves on the Editorial Advisory Council for the magazine. He has spoken at MDRI, Top of the Table, and NAIFA conferences both for focus session and on their main platforms.

Greg is an active 20 year member of the Million Dollar Round Table with 11 Top of the Table qualifications. Over the years Greg has served on numerous committees. Presently he serves as the Global Council Member for Annual meeting and Global Conference. He is an active supporter of the MDRT Foundation and has reached a giving level of Platinum Knight status.



Angie Herbers
Chief Executive
Herbers & Company

Angie Herbers is CEO of Herbers & Company, an independent and objective consulting company. Her organization focuses on human behavior research, creating innovative human capital programs and developing leaders to spur advisory firm growth.

Her organization has consulted with over a thousand financial advisory firms across the US and a select group of advisory firms internationally, on how to develop their human capital, enhance management, create leaders and build training programs to fuel firm growth.

Herbers research, content and innovation has been published over a thousand times in domestic and international trade publications and articles. She is a blogger for ThisAdvisor.com and columnist for Investment Advisor magazine and Globally syndicated.

Angie Herbers has been named by Investment Advisor magazine, "Top 25 Most Influential People in the Advisory Industry" in 2007, 2013, 2015, 2018 and 2019.

Leader-2-Leader: The Power of Growing Organically





EIGHT AREAS OF ORGANIC GROWTH

There eight areas of organic growth business coordinate and operate throughout the lifecycle of their company.



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GROWTH AS AN EXPERIENCE

- ❑ Bottom-Line Profit
- ❑ Top-Line Revenue
- ❑ Assets Under Management
- ❑ Motivation / behaviors of human capital
- ❑ Owners Income/shareholder dividend
- ❑ Enterprise value/valuation
- ❑ Number of clients served
- ❑ Getting more efficient

GROWTH DEFINED

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CHAOTIC GROWTH IS THE ENEMY

Balanced Areas of Business
75% CONSISTENT GROWTH

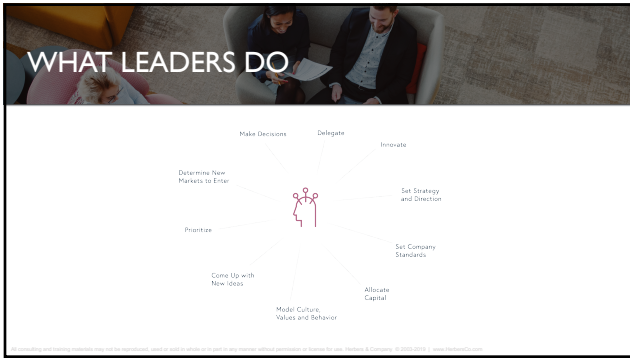
Unbalanced Areas of Business
75% CHAOTIC GROWTH

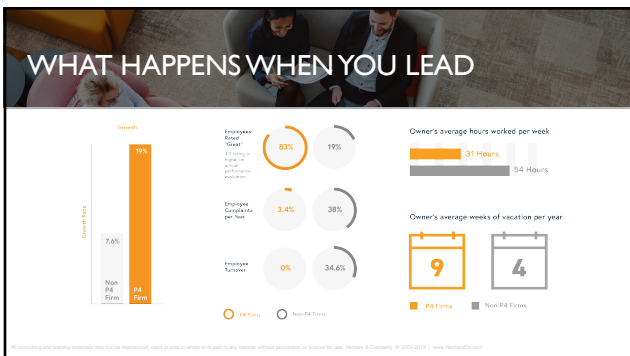
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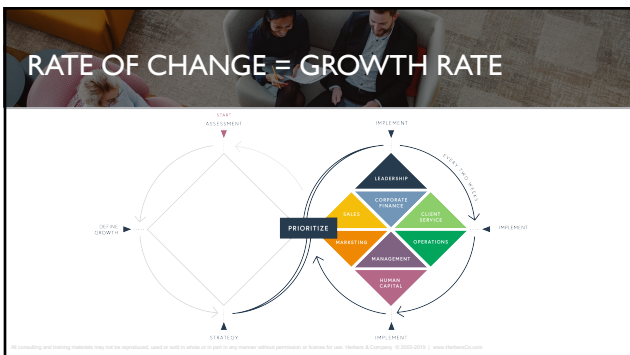
MORE LEADERSHIP TO GROW

Leadership	VS.	Management
Influencing	VS.	Directing
Guiding	VS.	Doing
Questions	VS.	Telling

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WE FOCUS ON ROI

Return (Benefit)
Investment (Cost) = **9X** RETURN ON INVESTMENT

9X RETURN ON INVESTMENT

Growth Rates

Time

Capital Allocation

KEY TAKEAWAYS

- 1**
Understand Growth
Growth cannot happen without an investment
- 2**
Define Growth
You must quantify what growth means to you before trying to grow
- 3**
Transition to a Leader
Surround yourself with people who are leading and have led rather than doing
- 4**
Understand ROI
Make all capital expenditures on ROI not emotion or "want"
- 5**
GROWTH
