

Join Our Mailing List!

Forward to a Friend



All that we behold is
full of blessings.

— William Wordsworth

At this time of year, we are especially grateful
for the bountiful relationships that bring us such joy.
Please accept our thanks for your
trust and friendship throughout the year.

In the spirit of gratitude, we have
made a donation on your behalf to Oxfam America.

— Happy Thanksgiving
from your friends at Commonwealth

 COMMONWEALTH *financial network*

2016 National Educational Conference

November 21, 2016



Commonwealth Financial Network's 2016 Annual National Educational Conference for Financial Advisors

I recently attended a national educational conference for independent financial advisors. Hosted by Commonwealth Financial Network®, the nation's largest privately held independent broker/dealer and Registered Investment Adviser, the event drew 1,750 affiliated advisors, staff, guests, and sponsors from across the nation. We gathered in Austin, Texas, November 3-6, 2016, where we connected and collaborated with peers, colleagues, and industry partners to strengthen leadership skills and enhance the high-end service that we provide to clients.

The conference theme, "Silver Linings: Transforming Obstacles into Opportunities," encouraged us to embrace the power of perseverance and optimism and to seize on possibilities and a positive outlook for the future. The conference provided us with thought-provoking insights on advanced leadership and offered valuable, concrete strategies for turning challenges into opportunities for growth, setting achievable goals, and motivating others while staying true to what advisors and their practices stand for.

Members of Commonwealth's management team spoke. Wayne Bloom, CEO, spoke straightforwardly on the Commonwealth's decision-making process-addressing. Wayne addressed the Department of Labor's recent decisions regarding advisers, planning for the future, and affirming Commonwealth's resolute, long-term commitment to its advisors. Rich Hunter, president and COO of Commonwealth Financial Network, emphasized how Commonwealth's scale and flexibility, along with the firm's "tool kit" of personnel, technology, and product solutions and support Commonwealth affiliated advisors well positioned in the industry.

Darren Tedesco, managing principal innovation and strategy, shared Commonwealth's recent technology enhancements and upcoming plans, along with ways to leverage the firm's technology to work smarter. Brad McMillan, chief investment officer, provided perspective on the markets and economy.

Renowned keynote speakers offered topical remarks tailored specifically to an advisor audience:

Dan Rather, Award-winning broadcast journalist, candidly addressed his audience, offering leadership principles garnered from his personal interactions with world leaders over the decades. He encouraged all to hone listening skills and to practice gratitude, humility, and modesty.



Daymond John, Shark Tank investor, founder and CEO of FUBU, spoke to the fundamentals of success in business and life.



Jill Morgenthaler, retired colonel, discussed the power of persistence and offered strategies for overcoming obstacles and motivating others while staying true to oneself.



Marty Sandler, author, Emmy® Award-winning producer, made the history of accomplishing the seemingly impossible come alive through storytelling and sharing valuable lessons along the way.

Fabio Zaffagnini, who organized 1,000 musicians in a field in Italy to play a tribute to the Foo Fighters to convince the band to play a concert at a small venue in Cesena, Italy, was a surprise guest. By using the power of social media and positive thought, the Rockin'1000 video went viral and has now been viewed more than 33 million times. Fabio delivered a powerful message that anyone can make anything happen and evoke real change.

I also attended a wide array of educational sessions, panel discussions, and networking events on topics ranging from wealth management, practice management, and trust and tax strategies to information security and maintaining a compliant online presence in an evolving social media world.

"It was our privilege to host Paul at our 2016 National Conference. This year's conference-Commonwealth's largest educational event-was remarkable, including four full days of intensive learning, listening, and connecting for nearly 1,000 advisors from across the country. Equally important to us, the conference provided valuable one-on-one time, giving Paul the opportunity to reconnect with long-term friends, as well as to welcome new advisors into our community." said Wayne Bloom, CEO of Commonwealth.

Bloom added, "A major ingredient in Commonwealth's unique recipe is how we have always incorporated feedback from our advisors-and today, these lines of communication are as critical as ever. Transparent, candid conversations with our valued advisors drive our business decisions and ensure that, even in changing times, we continue to support Paul in running his business his way."

Bloom concluded, "We have an incredible community of advisors, and we thank Paul for his support and active participation. We will continue to provide the tools and resources that benefit Financial Security Planning Services, Inc. and support their practice in the most client-forward way."

Earlier this year, I was chosen to be one of a select group of 15 financial advisors across the country to serve on the Commonwealth Advisory Council, which met during the conference.



About Commonwealth Financial Network: Founded in 1979, Commonwealth Financial Network, member FINRA/SIPC, is the nation's largest privately held independent broker/dealer-RIA, with headquarters in Waltham, Massachusetts, and San Diego, California. The firm supports more than 1,650 independent advisors nationwide in serving their clients as registered representatives, investment adviser representatives, and registered investment advisers, as well as through hybrid service models. For more information on Commonwealth, you can visit our website: www.FinancialSecurityPlanning.com.

My staff and I deeply appreciate the continuing opportunity to work with you. Please let me know if you have any questions or requests. Thank you.

Sincerely,

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