Daniel Collison, BA, CFP, TEP

Author, Keynote Speaker & Performance Coach

HAS BEEN FEATURED ON

About the Speaker

Daniel Collison, BA, CFP, TEP

Managing Partner at Advice2Advisors

Dan has over 35 years of experience in the financial services industry, as an advisor, branch manager, trainer and performance coach. He is a Certified Financial Planner (CFP) and a Member of the Society of Trust and Estate Practitioners (TEP). Dan is co-founder and Managing Partner with financial education firm Advice2Advisors, which trains, mentors, and coach's growth-oriented financial advisors of all tenure on advanced financial planning and world-class business development strategies. Dan is a Board Member of the FP Research Foundation and past Chair of its Research Committee and has been a judge for Wealth Professional Awards since 2019. Dan taught Personal Financial Management in the MBA Program at the Schulich School of Business from 1998-2020 and is the author of The Financial Advisor's Guide to Excellence and newly released Building Bigger & Better: Growth Strategies of Top-Producing Financial Advisors. He is also a columnist with Nasdaq.com. Dan regularly presents keynotes and trains advisors across North and South America.

Experience

Dan has had the privilege of speaking at hundreds of financial industry events and conferences across North and South America - on all things growth-oriented for financial advisors, with specific focus on “the three confidences” of top-producers: confident mindset, confident business structure, and a confident growth plan. Consistently ranked as a top speaker by financial advisors and firms.

Keynotes & Workshops for Financial Advisors

- Building Bigger & Better: Growth Strategies of Top-Producing Financial Advisors (based on Dan's newest book)
- The Financial Advisors' Prospecting Dashboard: Double Your Business in 3 Years or Less
- Estate Planning Intensive: How to Monetize Estate Planning
- Becoming Your Clients' Personal CFO
- The Science of Peak Performance: Optimal Human Functioning
- Estate Planning for Financial Advisors
- The 4 Portfolios of Wealth Management
- Crush Your Competition with Tax Planning
- Building Client Service and Segmentation Plans
- Tax-Efficient Investment Planning for Financial Advisors
- Family Law and Money
- The Retirement Planning Process
- Why People Don't Buy Insurance... and What to Do About It
- The Client Acquisition and Retention Process
- Succession Planning for Financial Advisors: The Succession Planning Process
- Client Servicing and Segmentation Plans
- People Power: Building the Your Ideal Team
- The Elite Advisor's Business Structure: Developing Your UVP, Ideal Client, Business Model and Operational Processes and Playbooks.
- Passion: The Law of Attracting and Retaining Clients
- Behavioral Finance
- Questions, Questions, Questions - Are you asking the right questions?
- Psychology of Money: Making Money Make You Happy?
- Biases, Emotions and Financial Behavior
- Goal Setting Theory and Practice

Don't just take our word for it

Here’s what advisors say...

"This was likely the best, most engaging, event with realistic tools we can implement in our business right away. Dan was amazing and captured our attention the whole time. I believe this will be the number one growth driver for advisors moving forward.”

"After listening to Daniel, I am excited about this business again and growing my practice"

"Advice2Advisors gave me the opportunity to see just how many opportunities I may be leaving on the table and how the twist of a few words could be so impactful to building your business."

"Many many great insights and updates on concepts I was aware of, but Dan delivered them in fresh and relevant package. The Personal CFO is a great concept that I'm going to incorporate into my process."

"Dan is an enthusiastic trainer in the very profitable area of Estate Planning. Allow him to open your mind and practice to all of the touch points to get you started.

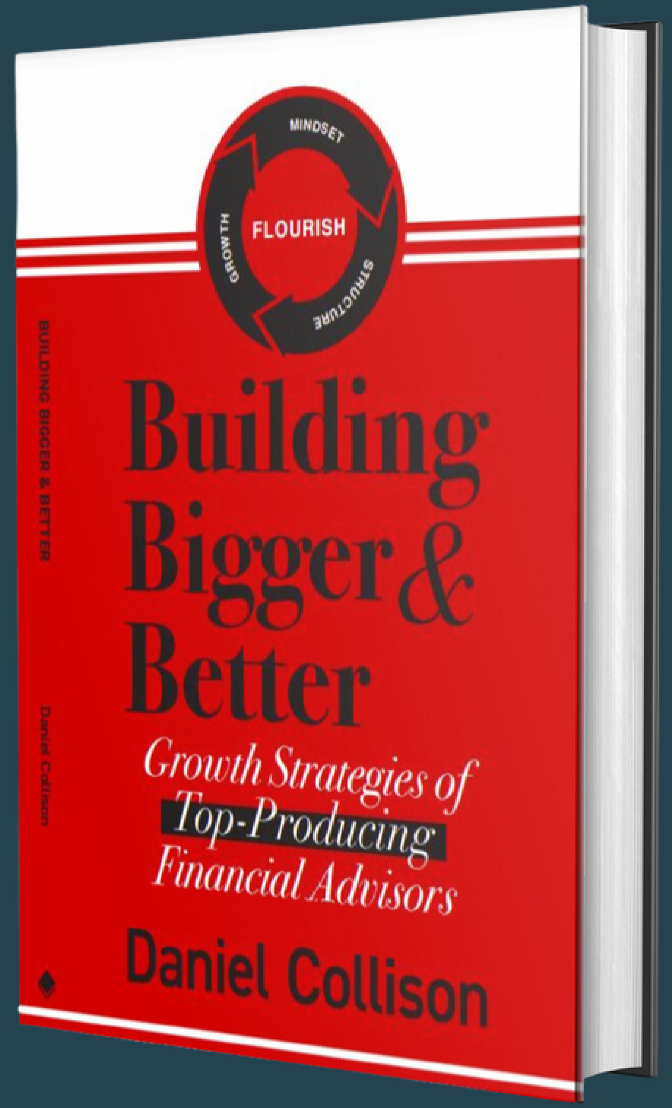
"Of all the seminars, training courses I've taken over the years this has them all\ beaten...quantifiable results. Dan was awesome. Very engaging with real life examples of his ideas working in the industry.

"Our keynote speaker, Dan Collison, is always a very energetic speaker, who combines passion and expertise on the subject matter. He followed this with a great assignment, Best of all, he delivered valuable, important insights and ideas that made the MastersSeries a huge success!"

"The EP program offered by Advice2advisors is practical training, delivered by someone who has done the work himself. This is not training offered by a non-active manager but someone who knows what it takes to succeed. I would highly recommend advice2advisors to anyone in the financial services industry."

"The concepts that Dan shared were a great eye opener to how simple it really is to scale up your business by just tweaking some of the tools that we are already using in our practices but with his guidance and insight he has shown us how to refine those skills so it takes less effort and is more effective. Great Content, Great Speaker!

"The estate planning courses provide solid, up-to-date content packed with useful tips to help advisors stand out. Dan's snappy delivery energizes better than caffeine! The sad part is when a course ends."



Questions or Inquires?

Toll-Free 1-833-226-2242

advice2advisors.com