



ROUNDTABLE

The Mastermind Group of Financial Advisors

2015 Session II: Growing Great

Quick Facts

Mentors: John Bowen
Paul Brunswick
Jonathan Powell

Facilitator: Bob Niederman

Coaches: Sharla Hamil
Kavita Arora
Tara Butler
Valerie Chaney
Karen Duncum
Andrea Groomes
Allyson Lee
Lois Pfeiffer
Julie Sendelbach

Team: Ken Bakar
Keeli Brendle
Phil Chao
Jeanne Hurlbert
Ron Reynolds
Mitch Slomiak
Katie Soden
Jennifer Stanton

October 7-9, 2015

Sofitel San Francisco Bay
223 Twin Dolphin Drive
Redwood City, CA 94065
(650) 598-9000

Agenda

Wednesday, October 7, 2015

- 11:00 a.m. Golf outing departs hotel for CordeValle golf resort.
- 2:00 p.m. Bonus Sessions: Breaking Through Tactical Acceleration
 - 2:00-3:15: Professional Network Leadership—Jonathan Powell
 - 3:30-4:45: Niche Marketing—Jonathan Powell
- 6:00 p.m. Welcome reception. You are welcome to bring your spouse or other guest.

Thursday, October 8, 2015

There will be a full breakfast buffet available beginning at 7:00 a.m. If this is your first Roundtable session, please join us for a welcome breakfast in the Veranda Room at 7:00 a.m.

Joel Weldon will provide feedback and recommendations following each presentation.

- 8:00 a.m. Opening—John Bowen
Brilliant Execution—Jonathan Powell
Increase Your Success Velocity—Jim Cathcart
Introduction to 10X Talks—Joel Weldon
10X Talks—\$160,000+ Ideas
Power Talk—Paul Brunswick
- Noon Networking Lunch
- 1:30 p.m. Power Talk—John Bowen
Breakout Session I
Hooked: How to Build Habit-Forming Products and Services—Nir Eval
Power Talk—Jonathan Powell
Key Connections and Actions from Day One—Bob Niederman
- 5:00 p.m. Close
- 5:30 p.m. Reception
- 6:30 p.m. Dinner at the hotel with a special guest speaker. You are welcome to bring your spouse or other guest.

Friday, October 9, 2015

There will be a full breakfast buffet available beginning at 7:00 a.m.

- 8:00 a.m. Opening
Rapid Results—Bob Niederman
Scaling Up: How a Few Companies Make It ... And the Rest Don't—Verne Harnish
10X Talks—\$160,000+ Ideas
Breakout Session II
Power Talk—Jeanne Hurlbert, Ph.D.
10X Talks—Results of Voting
Closing—Bob Niederman and John Bowen
- 12:30 p.m. Session Close
- 12:30 p.m. Lunch
- 1:30 p.m. Bonus Sessions: Focused Results Groups
 - Becoming the Go-to Advisor in a Small Community—Jonathan Powell
 - Plan to Grow Fast—Paul Brunswick
 - Scaling up to \$1 Billion or More—John Bowen and Jon Stone
- 3:30 p.m. Bonus Session Close

Please enjoy a drink at the hotel bar beginning at 3:30, compliments of CEG Worldwide.