The Broyles-Leadem Institute®

◆ The #1 Source of New Assets Under Management

◆ The #1 Product Area for the Coming Decade

Capturing IRA Rollovers

Your Complete Guide to the Lump Sum Market

Every year, $400 billion or more flow into rollover IRAs. Are you earning your share of this booming market?

Capturing IRA Rollovers

You supply the drive and hunger for achievement. The Broyles-Leadem Institute supplies the rest.

Why you need *Capturing IRA Rollovers*

IRAs are big business—and getting bigger. Every year, approximately $400 billion flows out of qualified plans and into rollover IRAs. By 2010, that figure is expected to grow to $500 billion annually. Rollovers have been singled out as the #1 source of new assets under management and the #1 product area for the next ten years.

Experience has shown that the biggest IRA rollovers go to those financial advisors who are thoroughly informed; this is a "winner-take-all" business. *Capturing IRA Rollovers* provides you with the knowledge you need to help clients and prospects at a critical time in their lives—plus a systematic marketing plan to help you open major new accounts.

A sampling of what you learn:

- What can and can't be rolled over to an IRA. *(The rules have changed!)*
- When an IRA rollover might not be the best option. *(Don't let your client fall into this little-understood trap!)*
- Powerful tax advantages available when a lump sum distribution includes employer securities. *(Find out what very few of your competitors know!)*
- How anyone can take money out of an IRA at any age penalty free. *(Clients are shocked to learn that they can do this.)*
- Roth IRA: who might—and might not—want to consider it. *(Your clients want answers. Now you can give them those answers.)*
- How million dollar producers who specialize in IRA rollovers are marketing their services. *(Use these ideas to fast-start your IRA rollover business.)*
- And much more...

We deliver exactly what you need to produce powerful results, for both you and your clients. Fast-paced — and fun, too!

A complete marketing strategy... from prospecting to after-sale follow-up:

- Identify and locate prime IRA rollover prospects.
- Conduct a powerful seminar to build business.
- Make an effective first contact.
- Approach human resources managers.
- Conduct proactive in-person meetings.
- Answer the tough questions most commonly asked by lump sum recipients.
- Create and present a winning proposal (sample provided).
- Open the account.
- Develop your own follow-up action plan.

Protect your book

If you don't help you clients with their IRA rollovers, your competition will. Prepare yourself to offer the service your clients need.

Open substantial new accounts

Assets in the average IRA rollover can be as much as 500% higher than assets in the average account. Prepare yourself to capture your share of this lucrative source of new accounts.

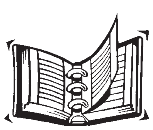
Earn the Certified IRA Specialist™ designation

Pass the exam for this course, and you will have completed 50% of the education requirements for your Certified IRA Specialist™ (CIRAS™) designation. Your remaining education requirement is to pass the exam for the Broyles-Leadem Institute course ***IRA Strategic Planning.***

** For additional CIRAS requirements please reference complete CIRAS literature.*

Everything you need to succeed.

Capturing IRA Rollovers *arms you with the resources you need to have your share of the lump sum marketplace. You receive a variety of special extras that you can call on to reinforce your understanding of key ideas and to help implement the marketing plan you develop. Here is a sampling of what you can expect:*



Instructional Material
Including six units of comprehensive instruction

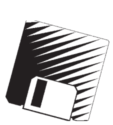
Final Exam
To help you gauge your knowledge of lump sum rules and regulations

Reference Guide
For even more detailed information on key topics

Certificate of Achievement
For display to your clients and prospects

Complete Seminar
For prospects/clients to jump start your IRA rollover business

Email Updates
To keep you informed of changes in the laws for a full year after your enrollment



Computer Disk
Containing effective marketing letters as well as a model proposal

Hotline
Access to the Broyles-Leadem Institute's telephone hotline for answers to questions on the course

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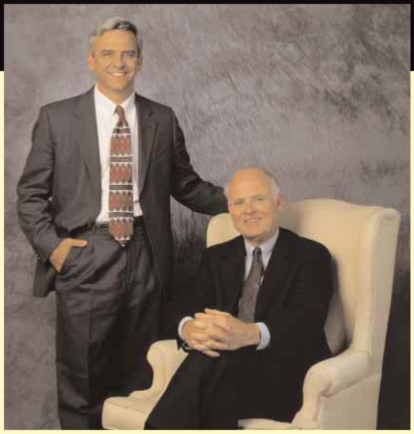
Joe Leadem and Phil Broyles

Founded by Phil Broyles and Joe Leadem, the Broyles-Leadem Institute is dedicated to enabling investment professionals to build their business and career by helping clients achieve their financial objectives. Broyles-Leadem Institute staff have coached over 30,000 financial professionals over the past 25 years and have been hailed as a securities industry leader in increasing the productivity of financial professionals.

"Is it worth your time to prospect IRA rollovers? Absolutely. It is estimated that more than $400 billion come out of qualified plans each year. I know of no other market as lucrative and important to financial professionals as today's IRA rollover market."

— Phil Broyles

"Using this course with several hundred of our advisors, my firm increased its new IRA assets by 50% in one year!"

— Senior Executive
Major National
Securities Firm

"By using just one idea on how to avoid the premature distributions tax, I took a $500,000 rollover away from the competition."

— 3-year Financial
Professional
Los Angeles, CA

"I invested thousands of hours over many years tracking down the answers you provide in one course. Where were you ten years ago?"

— 20-year Securities
Industry Veteran
Cleveland, OH

"Your course on IRA rollovers is great! My business is up by 50%, and I am not working any harder."

— 8-year Financial
Professional
Sacramento, CA

No-Risk Offer

Capturing IRA Rollovers comes with a 100% money-back guarantee. Examine the course for 30 days. If you are not 100% convinced that it can result in a substantial increase in your production and professionalism, simply return the materials, in original condition, for a full refund...no questions asked.

Enrollment Information

Individual Tuition Includes: All study materials, examination process, personalized certificate, Reference Guide, and a personal license to use the seminar presentation, marketing campaigns and one-year email update service.

To Enroll

Call the Broyles-Leadem Institute at **800/486-6002** to ask about tuition rates.

Certified IRA Specialist

Earned by completing both ***Capturing IRA Rollovers*** and ***IRA Strategic Planning***.*

Don't be satisfied with getting by. Give yourself the green light for maximum success. Satisfaction guaranteed!

** Note: To protect the integrity of the mark, the Broyles-Leadem Institute reserves the right to withdraw your right to use this mark if you fail to meet the Institute's professional code of ethics. Also, the Institute reserves the right to add future requirements to your continued use of the designation, including continuing education requirements and a licensing fee.*