ADVISOR WORKSHOPS 2010

Send your Advisors to the only program designed to enhance the productivity and professionalism of Financial Advisors in Banks, Thrifts and Credit Unions. Sessions will be led by top market and sales leaders from across the industry. Each Advisor will leave with a “Take-Away Action Plan” to help grow their sales.

Registration:

Registrants must be producing Advisors at depository institutions.

Fees

- There is no registration fee for Financial Advisors at ***BISA member institutions***.
- The fee is $1,395 for Advisors at ***non-member institutions***.

Confirmation and Billing

BISA will email registration confirmations to the Registrants and Program/Sales Manager listed on the Registration Form. Non-member invoices will be sent to Program/Sales Managers.

Cancellation/ “No Show” Policy

- Cancellations at least two weeks prior to event will receive a full refund.
- Substitutions can be made up to one day before event.
- Institution is responsible for a fee of $250 for cancellations within 14 or fewer days of event.

Hotel Reservations:

Participating and Leadership Members

BISA will reserve rooms for Advisors from Participating and Leadership Member Banks and send confirmation to the Program Manager. Complimentary rooms for one night are included as part of the registration for Participating and Leadership members according to the following schedule:

	Number of Complimentary Rooms available	
Institution Asset Size	“Bank” Participating Members	“Bank” Leadership Members
< $1 Billion	5	10
$1-5 Billion	15	30
> $5 Billion	20	40

Regular Members

BISA will reserve rooms for Advisors from Regular Member banks. Registrants will be responsible for paying for their room at the special BISA group rate.

Non-members

Non-members should make their reservations directly with the hotel. A block of rooms is reserved at a special conference rate. The group rate is guaranteed until a few weeks before each Workshop, or until the room block is sold out.

Advisor Profile Questionnaire

Each Advisor registered for the workshop will receive a brief questionnaire to complete and return so we can assure optimal grouping of participants in the Workshop and an agenda that will meet their needs.

Advisor Action Plan

Managers should know that each Financial Advisor will be asked to complete a Follow-Up Action Plan at the end of the program and should expect their Advisors to share this when they return. Peer group follow-up calls will be scheduled approximately three weeks after the workshop, during which Advisors will be encouraged to share their post workshop experiences in implementing lessons learned.