



**STRATEGIC FORUM 2007:
THE CONTINUING QUEST FOR EXCELLENCE
May 22-24, 2007**



Tuesday Evening, May 22, 2007

Member Reception

Grand Ballroom A, M, E

5-9pm



Wednesday, May 23, 2007

Breakfast

Grand Ballroom A, M, E

8-9am



How to Become an Extraordinary Leader: 10 Life Lessons, *led by Joe Stumpf*

General Session

Grand Ballroom

9-10:30am



Morning Break

10:30-10:45am





Three Important Business Lessons about Teams and Technology
From the Top Producers in North America

General Session
Grand Ballroom
10:45am-12:30pm

- ***Terry Moerler, Thousand Oaks, California*** – With the price of real estate dropping 10% to 15% and it taking 100% longer to sell, Terry had to reinvent herself. She'll share with you how she's adapted to the dynamic changes in her marketplace.
- ***Scott and Todd Asbell, Salt Lake City, Utah*** – The Asbell brothers' Rocky Mountain Mortgage business is on fire. They'll share with you how they've expanded into other areas and successfully managed unprecedented growth.
- ***Thomas Cook, Toronto, Ontario*** – This idea-a-minute guy is the top producer in Canada and one of the top 10 RE/MAX agents in North America. He's built an amazing Before Unit and will share with you how his cutting-edge use of technology and the Internet gets him results.
- ***Jim McQuaig, Reston, Virginia*** – He's become the voice of equity strategy and will help you understand and manage the equity aspect of real estate investments. He's on pace to becoming a billion dollar company
- ***Roland Castle, New Market, Maryland, and Jim Bass, Frederick, Maryland*** – They've each built huge organizations with more than 500 real estate agents. They'll share with you how to find your niche and grow.



Networking Lunch
Grand Ballroom A, M, E
12:30-2pm



Choose from Five Concurrent Breakout Sessions
2-3:30pm

Technologies I Use to Get New Business, *led by Thomas Cook*

Grand Ballroom F

Panel Experts:

- Todd Welsh – Provides all the leads for his 26 agents, doing 70 transactions a year while working only part-time.
- Patti LaMourey – Left the safety of the corporate workplace and successfully made the transition to navigating the entrepreneurial white waters of running her own office. Using referral and technology strategies, she quickly built a thriving business of her own with loyal, referral-generating clients.
- Sarah Eagleson – Has been in business for over 17 years. She's built a team of six agents and, using BY REFERRAL ONLY Before Unit strategies, generates buckets full of business.
- Kristie Smith – Has branded herself and become one of the top agents in Indianapolis in a very short period of time. She is masterful in her Before Unit, using technology and radio advertising to effectively grow her business over the last four years.



How I Build My 100% Real Estate Referral Business, *led by Terry Moerler*

Grand Ballroom C

Panel Experts:

- Jan Cotten – Has successfully started her business over again three times, after moving to Alaska, then to Southern California and then to Arizona. With each move, she ended up doing more business, with less effort, allowing her to spend more and more time with her husband, children and grandchildren.
- Nancy Black – Nancy and her husband, John, have perfected their After Unit. After living in chaos for years with no personal time for themselves or their family, they turned their business around by implementing great referral-generating systems and procedures. Nancy is now one of the top agents in Tennessee. What makes her even happier is that she has an abundance of time to spend with her children and grandchildren.
- Sandy Collins – Has a 12-month After-Celebration Service program which yields her over 40 transactions a year, in the million dollar price bracket. She'll generously provide you with all the details to create a similar system for yourself, sharing the links, costs and examples of exactly what she gives each client every month.

How I Build My 100% Lending Referral Business, *led by Scott and Todd Asbell*

Grand Ballroom D

Panel Experts:


- Athena Paquette – In the recent past Athena owned her own lucrative business in partnership with her husband. They were doing 30 loans a month. She was very unhappy, overworked, completely dissatisfied and 90 pounds overweight. She decided to return to her unique ability and has turned her life and business around. She's no longer a business owner/broker and instead is back to being a mortgage consultant. She's doing 15 loans a month, making more money than before, working half the amount of time and is now 90 pounds lighter.
- Robert Kosberg – Is the owner of a \$100 million company. His personal production is \$25 million. He's successfully integrated the BY REFERRAL ONLY business strategies into the lives of four other loan officers in his company who together produce \$75 million. Robert will share how he's successfully cloned himself in his business and created more abundance for himself and his team.
- Susan Lipston-Hughes – Has achieved a 100% referral business, drawn from a base of approximately 400 people. Her primary methods for staying connected to her clients are through very personal communications including cards, notes, gifts and special events. Through this approach she has a consistently predictable business, regardless of the economics of the marketplace. She's come a long way to get there; not long ago she was in total survival mode but since implementing the systems, she's created stability and is now mentoring others and stepping into significance.

How I Serve As a Financial Consultant, *led by Jim McQuaig*

Grand Ballroom B

Panel Experts:

- Jason Purcell – Is a disciple of Jim McQuaig's four-step process. He's mastered the method of helping people use their mortgage as an asset to build wealth. He's going to give you his interpretation of how a mortgage consultant can be more of a financial guide than a person who "does loans."
- Tane Cabe – Is a very successful, entrepreneurial mortgage consultant. He really has two businesses: a mortgage consulting business and a reverse mortgage consulting business. He's one of the highest-producing loan officers in the Seattle area. He's organized his team to produce at a high volume while requiring very little of his time.



How We Build a Mega Team, *led by Jim Bass and Roland Castle*

Grand Ballroom H



Afternoon Break
3:30-3:45pm



Concurrent Breakout Sessions Repeat
3:45-5:15pm



Dinner
Grand Ballroom A, M, E
5:30-7pm



Architecting Your Perfect Life, *led by Meshell Zwicker*

Grand Ballroom

7-10pm

Leave this session with a clear mental and emotional picture of your ideal life.
(Bring your journals – magazines are NO LONGER REQUIRED)

Thursday, May 24, 2007

Grand Ballroom A, M, E

Breakfast
8-9am



Step-by-Step Instructions on How to Build Your Before Unit Using the Latest Technologies: Blogging, Podcasting and More, *led by Dean Jackson*

General Session
Grand Ballroom
9am-12:30pm



Networking Lunch
Grand Ballroom A, M, E
12:30-1:45pm



The Best of Dialogue School: Specific Techniques for Memorizing Magic Word Technologies and Applying Conscious Language to Up-Level Your Results,

led by Joe Stumpf
Grand Ballroom
1:45-5pm



Closing Session with Joe Stumpf
Grand Ballroom
5-5:30pm