

THE ESSENTIALS OF LEADERSHIP & MANAGEMENT

Open Enrollment Class

JUNE 25-29, 2012

**MODERATOR:
ROBERT AVERNA,
CLU**

**Facility:
Conference Center
2901 Telestar Court
1st Floor
Falls Church, VA 22042**

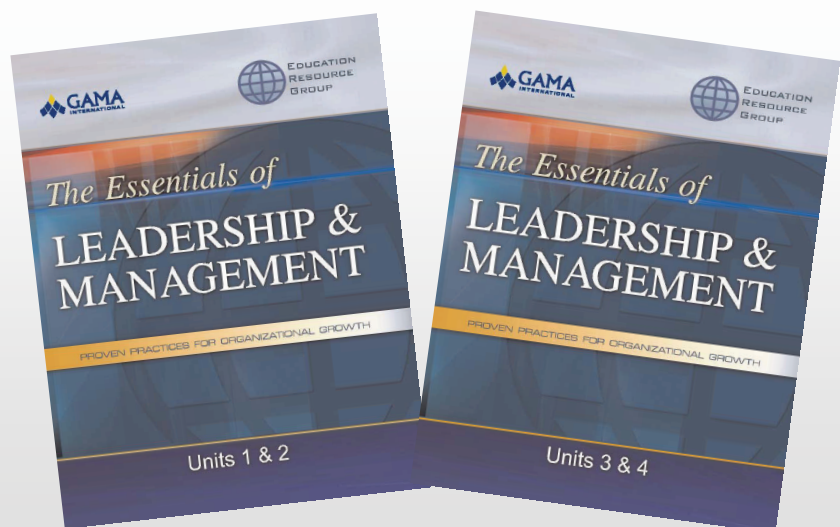
**GAMA Contact:
Jen D'Alessio
Phone: 571.499.4310**

The Essentials of Leadership and Management is a results-oriented program that will dramatically improve your organization's growth and success.

Many training programs tell you how to build your field organization, but *The Essentials* shows you how to do it, step by step with —

- Exciting concepts.
- Challenging exercises.
- A highly interactive environment.
- Skilled facilitators.

Join us for a powerful learning experience!



Class Logistics

Pre-Work/Homework/Computer

GAMA will e-mail you, as part of your pre-work, instructions and a business plan template (in Microsoft Word) for completion. A small portion of the business plan must be completed prior to the beginning of class. Basic knowledge of Microsoft Word and PowerPoint will be extremely useful in completing your class assignments.

Materials

Please see the list of required materials on the following page.

Class Schedule

7:00 a.m. – 6:00 p.m., Monday

8:00 a.m. – 6:00 p.m., Tuesday through Thursday

8:00 a.m. – 12:30 p.m., Friday*

*You are required to be here until 12:30 p.m. – please allow time for travel to the airport when scheduling your return flight.

Dress

Monday-Thursday: Business Casual

Friday: Business

Registration and Cost

See attached Residency Application.

Travel

Hotel: Participants are responsible for making their own travel and hotel reservations with Homewood Suites by Hilton
8130 Porter Road
Falls Church, VA 22042
703.560.6644

Special room rate: \$199.00 per night plus tax. When making reservations, please inform the hotel that you qualify for the GAMA room rate.

Airports: Reagan National Airport (30-40 minutes)
Washington Dulles Airport (40-45 minutes)

Taxi/Limo Service: We recommend U.S. Executive Sedan & Limo Express at 800.868.0792 to reserve a car to pick you up. Cost is about \$45.00 (from either airport). This is a great deal — only about \$5.00 more than a taxi!

Class Overview

GAMA International's *The Essentials of Leadership and Management* is an intensive, five-day management development course organized around five vital elements required for building an agency or firm strong enough to grow and thrive in today's world. These elements lay the groundwork for the highest impact take-away from any seminar or training that participants will experience in their careers: a formal business plan that covers all areas of agency development.

Classes will run:

Monday 7:00 a.m. - 6:00 p.m.

Tuesday through Thursday 8:00 a.m. - 6:00 p.m.

Friday 8:00 a.m. – 12:30 p.m.

Daily participation and completion of exercises is critical to your success. Please be prepared to spend an additional 2 to 2.5 hours each evening applying the day's lessons to your agency or firm.

Materials Checklist

Please bring these items to class with you:

- Paper, writing utensils, and highlighters.
- A laptop computer with PowerPoint. Please make sure you have PowerPoint loaded on your laptop **before** the class begins. You will utilize your laptop in the evenings when you are doing homework, working on your business plan and creating your PowerPoint presentation (laptop does not need to be brought to the classroom).
- CD-ROM or memory stick.
- Your mission statement and value proposition statement, if you have them.
- Your job description, if you have one.
- Three-, five- and ten-year agency vision statements.
- A list and examples of any selection tools you use.
- A list and examples of any training tools you use (for accountability training and monitoring).

You will receive an assignment, via email, to be completed before the class begins.

- Complete the Business Plan Activity as detailed in the pre-course assignment packet.

Class Agenda

Day 1 – Unit 1: Leadership, Vision and Values

7:00 a.m. - 6:00 p.m.

- Study a variety of successful leadership styles and techniques and adapt them to your personality and disposition.
- Develop your business vision to energize your team and guide your organization's growth.
- Tie your vision to your personal values.
- Create an environment that attracts and retains high-quality people.
- Understand some of the tough decisions required to run an effective organization.

Day 2 – Unit 2: Recruiting, Selection and Retention

8:00 a.m. - 6:00 p.m.

- Define the characteristics of your ideal candidate.
- Recognize the importance of long-term building decisions for your organization versus short-term solutions.
- Build your recruiting plan based on proven practices of top performers.
- Develop a consistent process to select candidates who can and will succeed in your organization.

Day 3 – Unit 3: Training, Supervision and Accountability

8:00 a.m. - 6:00 p.m.

- Put in place the training, supervisory, and accountability processes to enable you to teach ordinary people to deliver extraordinary performances.
- Develop a structured supervisory system that delivers training and education during the first five years of the advisor's career.
- Learn proven techniques that keep your financial advisors motivated and focused on the activities required to keep them growing, financially and professionally.
- Understand the role of accountability groups and the results they can bring to individuals and the organization.

Day 4 – Unit 4: Personal Development and Growth

8:00 a.m. - 6:00 p.m.

- Determine your managerial styles and approach to management.
- Discover your professional strengths and weaknesses.
- Explore the techniques to develop opportunities and compensate for weaknesses.
- Assess your organization's climate and learn techniques to improve it.
- Explore opportunities for building your organization through strategic alliances.
- Learn signs for identifying management talent in others.

Day 5 – Graduation

8:00 a.m. -12:30 p.m.

- Present Your Business Plan

The Essentials of Leadership and Management Residency Application

Falls Church, VA Class Location		Dates: <u>June 25</u> From		<u>June 29, 2012</u> To			
Name		Designations					
Title		GAMA International Member ID #					
Company		Firm/Agency					
Business Address							
City ()		State ()		Zip		Country	
Phone		Fax		E-mail			
Card Number			Expiration Date Code		Billing Address Zip		

Signature

Registration fee: ♦ GAMA International Member - \$1,795 ♦ Non-member - \$1,995

Form of Payment: Personal Check Company Check Visa MasterCard AMEX

Participant Agreement

I understand that certification for completion of *The Essentials* course is based upon my class participation, completion of assignments and the submission of a final business plan. I also understand that I am not eligible for a refund of my tuition if I withdraw from the program once the class has begun. **Please note:** GAMA International reserves the right to cancel or reschedule classes should circumstances warrant.

Signature

Date

Cancellations and No-Shows

Cancellations must be received in writing at least 10 business days before the class start date to obtain a refund. A \$150.00 cancellation fee will apply. Registrants who do not cancel at least 10 business days before the class start date will not receive a refund or credit of fees.

Submit your registration to GAMA International:

By Mail: GAMA International, 2901 Telestar Court, Suite 140, Falls Church, VA 22042-1205

By Fax: 571.499.4302 (Attn: Jen D'Alessio) (credit card payment only)

GAMA International does not reserve seats for Open Enrollment classes. Registration is NOT complete until GAMA International is in receipt of this signed registration form with payment.

Registrations must be received by May 21, 2012.