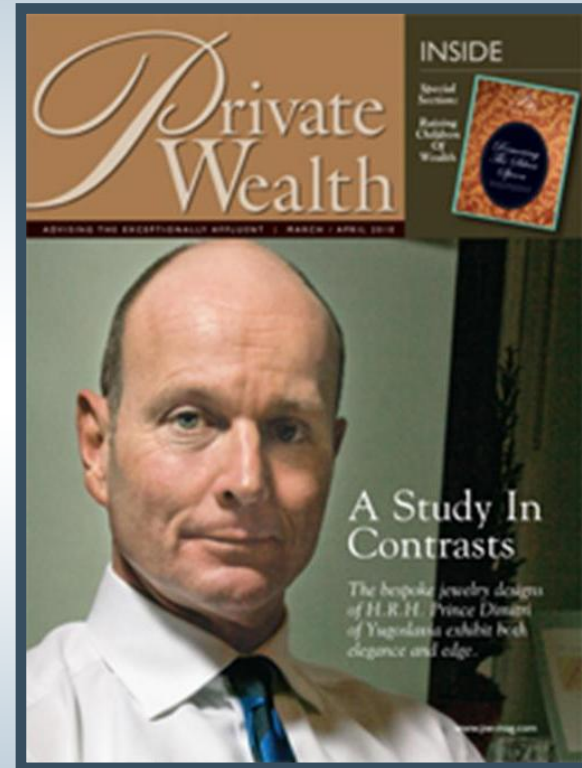
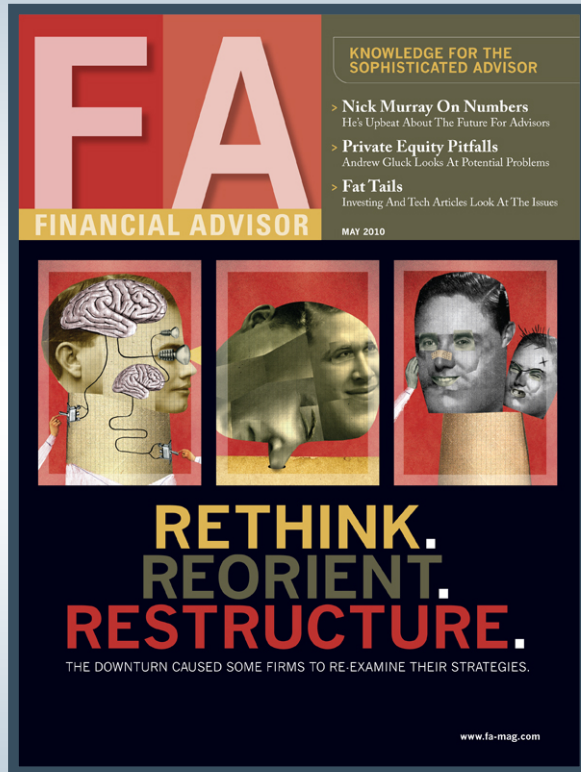


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Tom Costanzo

VP, Relationship Development

Nationwide Financial

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Brett Ellen

President & Founder

American Financial Network and
The Collaborative Services Platform

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THE COLLABORATIVE SERVICES PLATFORM

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WHAT'S ON YOUR MIND?

1. What do you see as the greatest challenges facing financial advisors today?
2. What do you see as the greatest opportunities?

TRY ON A NEW PERSPECTIVE

“Man’s mind stretched to a new idea never goes back to its original dimensions.”

- *Oliver Wendell Holmes, Jr.*

AMERICAN FINANCIAL NETWORK

THE COLLABORATIVE SERVICES PLATFORM

BUILDING A TEAM OF CHAMPIONS

A CHAMPION'S POINT-OF-VIEW

“I skate to where the puck is going to be
not where it has been.”

- *Wayne Gretzky*

BUILDING A TEAM OF CHAMPIONS

The CSP is an innovative and strategic planning group comprised of best-in-class financial professionals who effectively connect the interests of individual clients and the companies they own or represent.

THE CSP

4 Big Picture Takeaways

- **Navigate More HNW Ideas**
- **Know What Business Owners Are Thinking About**
- **Build Meaningful Professional Relationships**
- **Create An Exit Strategy For Your Practice**

NAVIGATE MORE HNW IDEAS

**Alternative Investments,
CLTs, PPVULS, COLI, BOLI,
Roth Conversions
Deferred Compensation
and more.**

THE CSP

Why Corporate Planning Matters

THE CSP

***Connecting the interest of individuals and
the businesses they own or represent.***

THE CSP MARKET OPPORTUNITY

- **275,000 U.S. Companies with annual revenues between \$10M and \$250M**
- **The Middle Market is vastly underserved**
- **For each company there is a different reason why we connect**

ON THE MINDS OF BUSINESS OWNERS

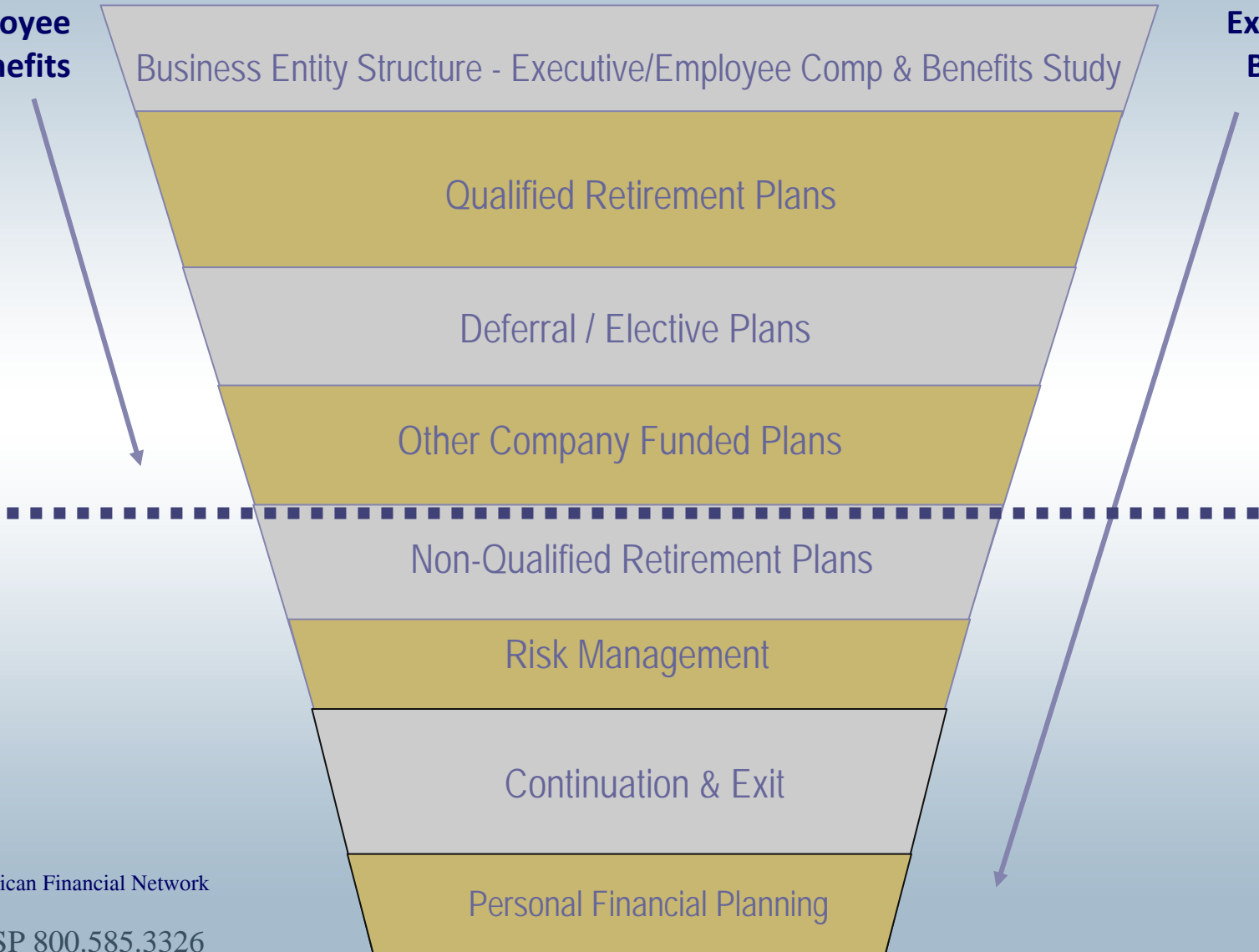
How Do I...

1. Achieve my business growth objective?
2. Reduce & control my expenses, including insurance costs?
3. Reduce my taxes?
4. Protect my assets?
5. Attract, retain, reward & create incentives for key talent?
6. Offer competitive benefits & qualified plans for my employees?
7. Plan and prepare an effective exit strategy?

THE CSP FLOW CHART

**Employee
Benefits**

**Executive
Benefits**



THE CSP ADDRESSING THE NEEDS

YOU CAN'T GO IT ALONE

THE CSP IN ACTION

A CASE STUDY



Navigating and Creating More Opportunities Together

FINANCIAL SOLUTIONS ALLIANCE

3rd Party Professionals in the CSP

**Transactions are great.
Relationships are BETTER.**

ACCESS THE FSA MEMBERS

Build Meaningful Professional Relationships

Bring more to the table right now.

THE CSP MODEL



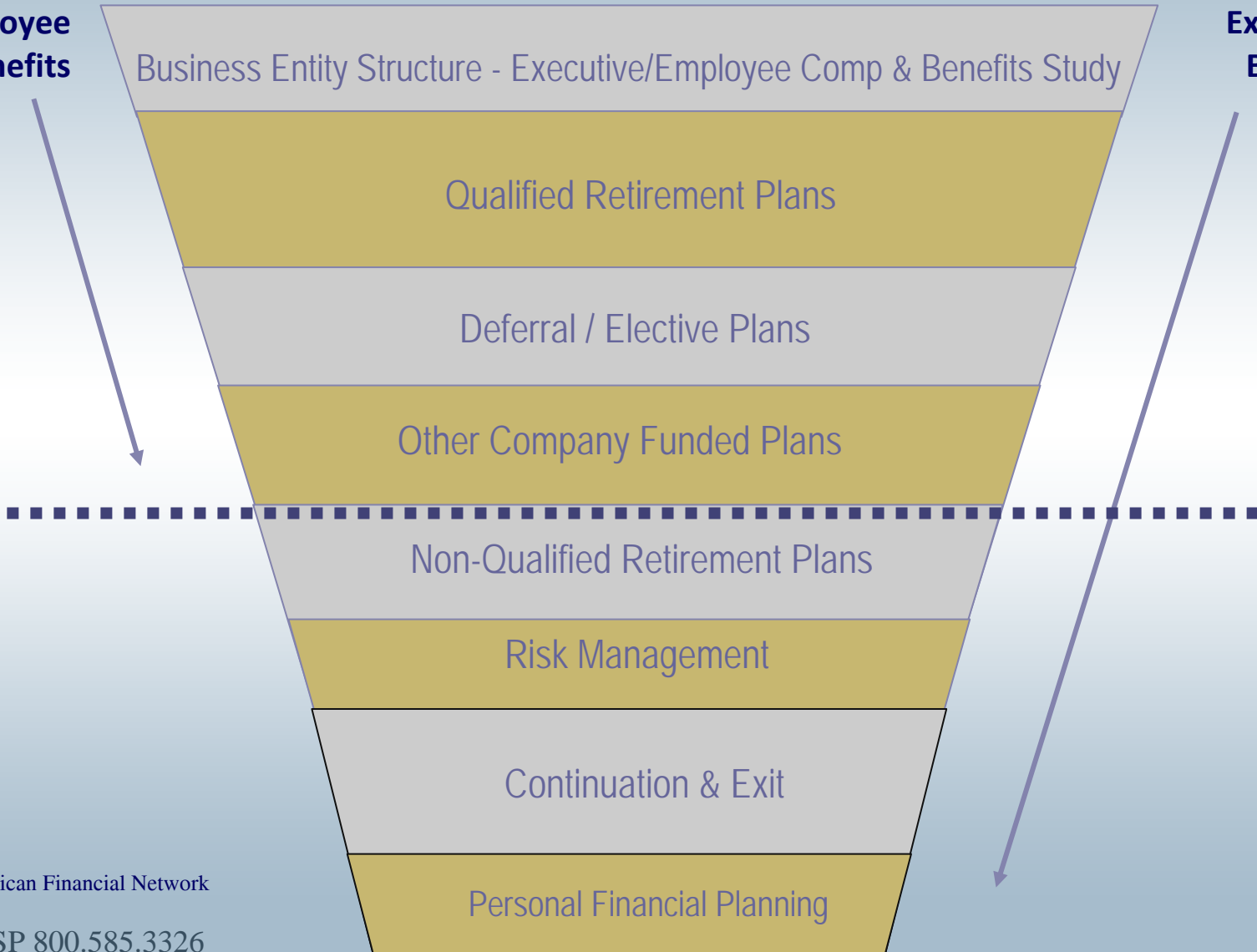
LEVERAGE CSP POINTS OF ENTRY



THE CSP FLOW CHART

**Employee
Benefits**

**Executive
Benefits**



AMERICAN FINANCIAL NETWORK

THE COLLABORATIVE SERVICES PLATFORM

Build Your Practice for Today and Tomorrow

YOUR OPPORTUNITY WITH THE CSP

- **Leverage more than 25 years of expertise**
- **Gain access to best-in-class, like-minded financial professionals**
- **Offer more intellectual property to existing clients**
- **Develop enhanced distribution channel for future clients**
- **Obtain a competitive edge in the marketplace**
- **Prepare for a better continuation or exit plan**

THE CSP

RECAP – The 4 Big Picture Takeaways

- **Navigate More HNW Ideas**
- **Know What Business Owners Are Thinking About**
- **Build Meaningful Professional Relationships**
- **Create An Exit Strategy For Your Practice**

THE CSP SUMMIT

*June 2-4, 2010
Huntington Beach, CA*

*October 28-30, 2010
Location TBA*

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Building a Team of Champions



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We Are Stronger Together



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June 2-4, 2010

Huntington Beach, CA

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cfponline.com/CSPsummit

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