



2024
**ADVISOR
SUMMIT**

Jan 23-25 • Houston, TX





Welcome to the Advisor Summit Kick-off Lunch

Hosted by: Paul Larson, Colin Wiens,
& Mitch Wood





Welcome & Introductions

- What are the expectations from this year's Advisor Summit?
- What will be some of the key takeaways?
- Our combined vision is one of collaboration and growth!





Executive Leadership Team

Paul Larson, CEO, Larson Financial Holdings

Paul is the CEO of Larson Financial Holdings, overseeing diverse affiliate businesses. The company's mission, "Empower All To Flourish," centers on being a comprehensive financial resource for Colleagues, Clients, and Communities. With over 200 Advisors managing \$5.5 billion in assets across 30 states, Larson Financial Holdings is among the fastest-growing integrated financial firms. The company offers extensive services, including Alternative Investments, Property Management, Retirement Planning, and more.

Paul also leads the Larson Financial Foundation, actively involved in charitable work across various regions. As a serial entrepreneur, he has played a crucial role in launching and investing in over 42 businesses across six countries. Larson's commitment to philanthropy includes projects like digging water wells in Africa and facilitating medical clinics. Married to Rebecca with eight children, including four internationally adopted, Larson aims to leave a positive legacy through advocacy and philanthropy.





Executive Leadership Team

Colin Wiens, President, Larson Financial Group

Colin is the President of Larson Financial Group and Larson Financial Securities, and oversees growth and efficiency initiatives for clients, colleagues, and communities. Initially leading the Central Florida office, he focuses on serving doctors and dentists in the southeast U.S. In his financial planning practice, Colin prioritizes first-class service for physicians, leveraging his Bachelor's and Master's degrees in Business Administration and holding the CERTIFIED FINANCIAL PLANNER™ (CFP®) designation. Based in Lakeland, Florida, Colin and his wife, Cayla, enjoy family time, travel, cooking, and are active in their local church.





Executive Leadership Team

Mitch Wood, President, Intrua Financial

Mitch oversees the service teams in Houston and Milwaukee who support independent and aligned advisors. He balances the dynamics of an integrated platform for registered representatives of LPL who are also Investment Advisors of Intrua and LPL.

Mitch is focused on revamping the advisor experience at Intrua to mirror the strengths present on the Larson side, so that collectively, our advisory teams can focus on what they do best. He has a passion for helping advisors systematize their operations to minimize tedious work. His approach to constructing quality, approachable content and quality repeatable systems has been utilized by many firms to construct more effective client messaging and operations.

A woodstove enthusiast, Mitch lives in the Minneapolis area with his wife Katrina, their four headstrong children, and three cats.





Executive Leadership Team

Jon White, President, Larson Capital Management

Jon White is the President of Larson Capital Management and is responsible for all acquisitions and dispositions. Until May 2017, he served as President of Hoffman Commercial Real Estate (HCRE) and Operating Partner at Osprey Capital, a large family office private equity firm based in Chicago, IL.

At HCRE, he was responsible for the deployment of private equity through strategic acquisitions of office, retail, industrial and multi-family assets. During his tenure at HCRE, Jon executed in excess of \$1.5 billion of transactions.

As an Operating Partner at Osprey Capital, Jon was responsible for business development, lender sourcing/management, project finance, capital raise, capital deployment, asset/portfolio profitability, M&A underwriting/financial, deal flow and strategic direction.





Executive Leadership Team

Kelly Eisenloeffel, COO, Larson Capital Management

Kelly Eisenloeffel was recruited in 2018 to Larson Commercial Real Estate (LCRE) as the Director of Asset Management. Tasked with building the foundation for a scalable, fully integrated real estate company, she executed a growth strategy which catapulted LCRE into the top five management companies in the St. Louis market area, with over 2 million sq. ft of commercial office space. Under Kelly's leadership, company revenue grew in excess of 300%, allowing Larson Capital Management to purchase over \$200M of commercial real estate nationwide.

With almost 20 years of commercial real estate experience working with both institutional and entrepreneurial clients, Kelly is strategic about every project Larson pursues. She focuses on executing individual business plans through the oversight of all aspects of an asset's life cycle.





Executive Leadership Team

Brent Robbs, President, Larson Tax Partners

Brent Robbs is a CPA financial planner that has been providing superior tax planning advice for nearly 15 years. Brent enjoys working with clients, identifying tax-saving opportunities, and simplifying complex tax rules so that clients can make informed decisions. As the President of Larson Tax Partners, Brent leads a team of accountants that provide full-service tax planning and preparation for individuals, businesses, trusts, and non-profit organizations. Larson Tax Accountants work closely with Larson Financial Advisors to provide a holistic, team-based approach to personal finances.

Prior to his current role, Brent worked as a tax accountant at a public accounting firm, as a consultant at a brokerage firm, and as a financial advisor at a bank. Outside of the office, Brent enjoys spending time with family and friends, traveling, hiking, and fishing.





AUA Summary

as of 12/31/23

Larson AUA

- 32 Advisors @ **\$3.11B**
- Per Advisor Averages:
 - \$97M AUA
 - \$1.09M Revenue

Intrua AUA

- 34 Advisors @ **\$2.94B**
- Per Advisor Averages:
 - \$91.4M AUM
 - \$511K Revenue

\$6,043,309,750





Next Session starts at 1:00p

“The Power of Why” with Paul Larson
and “Building a Scalable Plan” with
Colin Wiens





2024

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Opening Session "The Power of Why"

Hosted by: Paul Larson





Name That Advisor..

1. Had all the leftovers from a new client dinner bagged and delivered to the table in "to go" containers in the middle of the investment presentation.
2. Hosted a webinar with a physician client having sex unmuted.
3. Had diarrhea and ran out of TP at a new client's house.
4. Recommended double dick disability insurance in a presentation
5. Accidentally put a new prospects statements on the roof of his car.





“I want a million dollars”



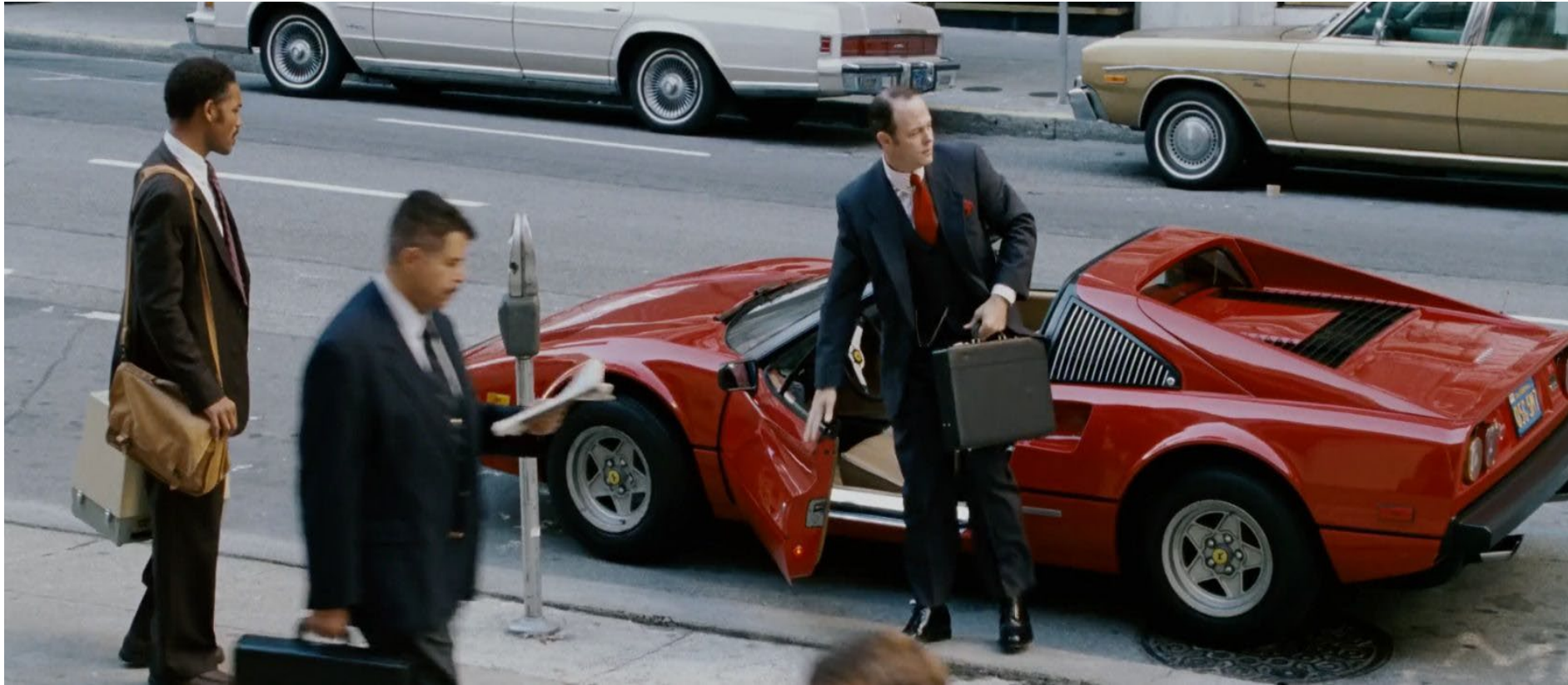


Bob Bridges





Bob Bridges





Chris Gardner



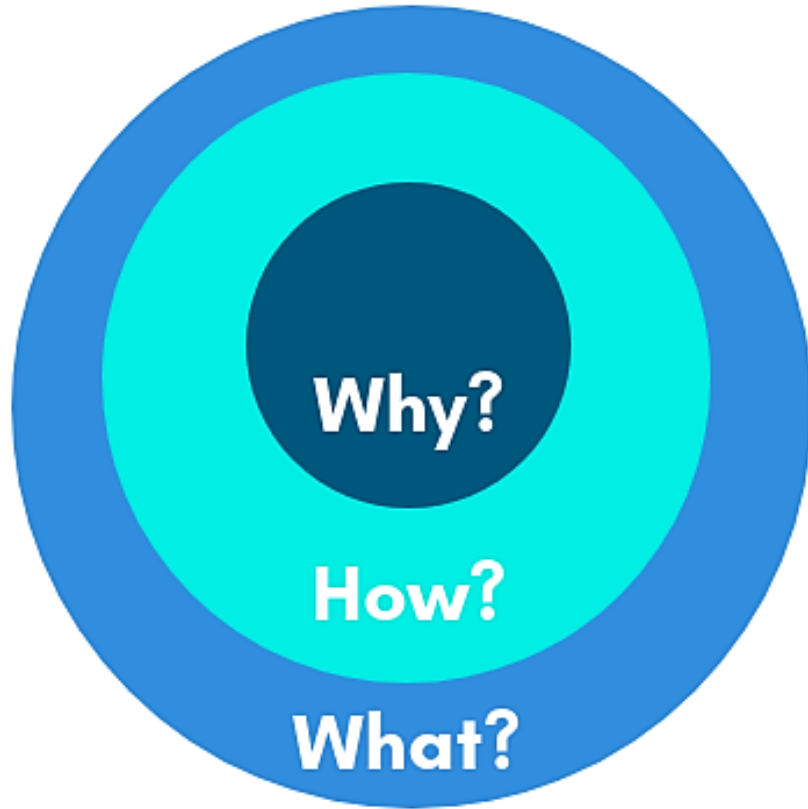
CHRIS GARDENER AND HIS SON WERE HOMELESS BEFORE HE BECAME A STOCK BROKER WHOSE NET-WORTH IS NOW **\$60 MILLION**.



THE MOVIE "THE PURSUIT OF HAPPINESS" STARRING WILL SMITH IS BASED ON HIS LIFE.



The Power of Why



Why = The Purpose

What is your cause? What do you believe?

How = The Process

Specific actions taken to realize Why.

What = The Result

What do you do? The result of Why. Proof





What drives you?

- I want to manage \$1B of AUM
- I want to only work 30 hours a week
- I want to give money to charity

**These are "Results" of "WHAT"
Not "WHY"**





Compelling "WHY" Answers

- If I don't make money for my family, I will not eat
- God has created me to KNOW Him, ABIDE in His love, and out of the overflow of this, use the resources He has given me to be a BLESSING to the nations. (Know God, Abide, Bless others)





“Building a Scalable Practice”

Hosted by: Colin Wiens

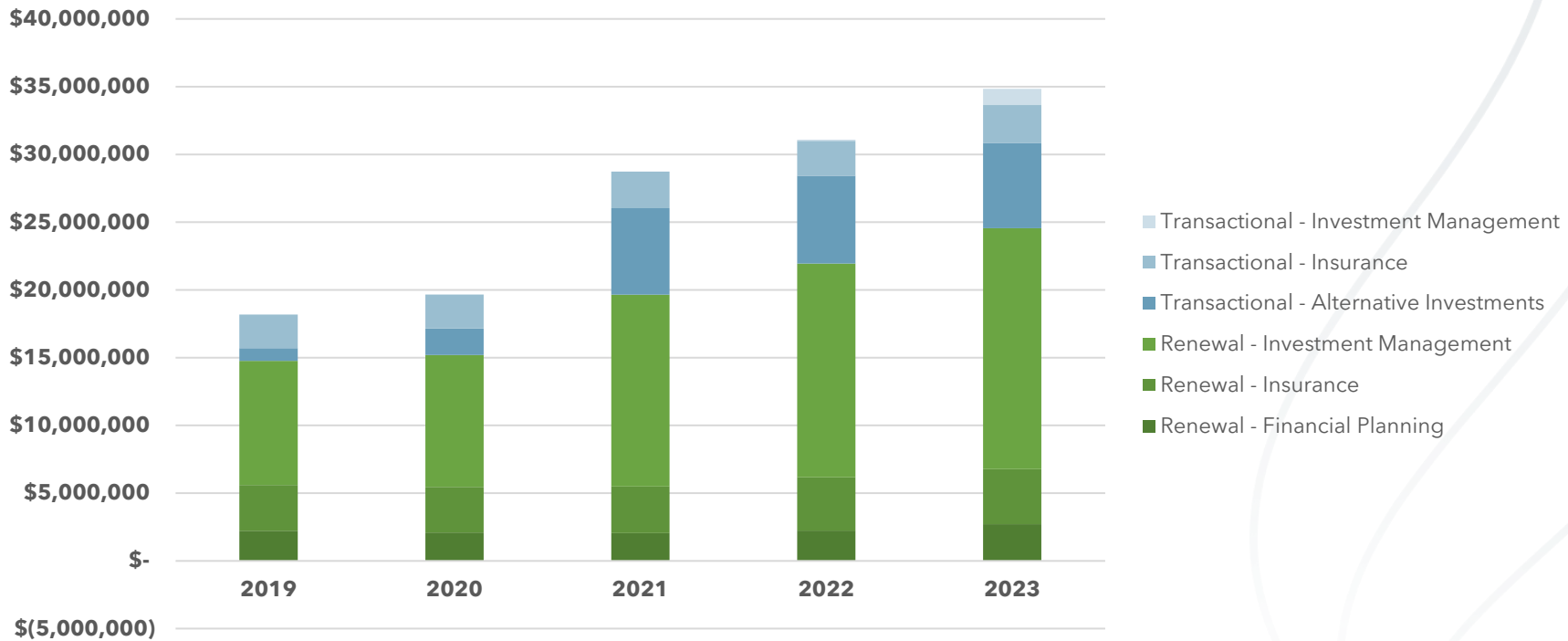




Building a Scalable Plan

Revenue: Recurring vs. Non-recurring

Revenue: Recurring





Building a Scalable Plan

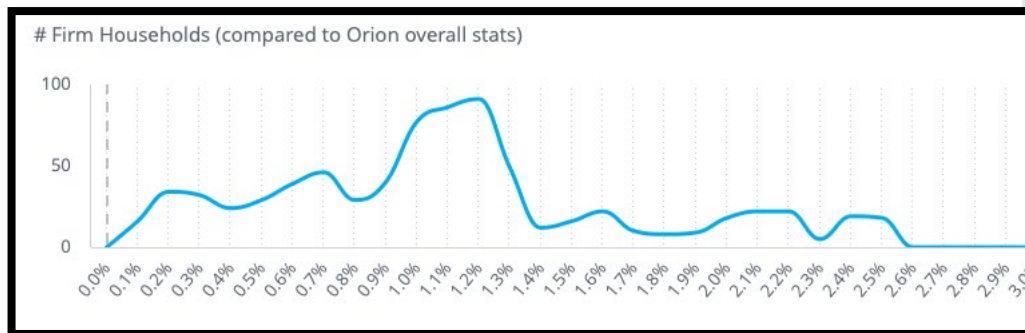
Revenue: Recurring - AUM Fee

LARSON

Average Fee

1.10%

Standard Deviation 0.27%

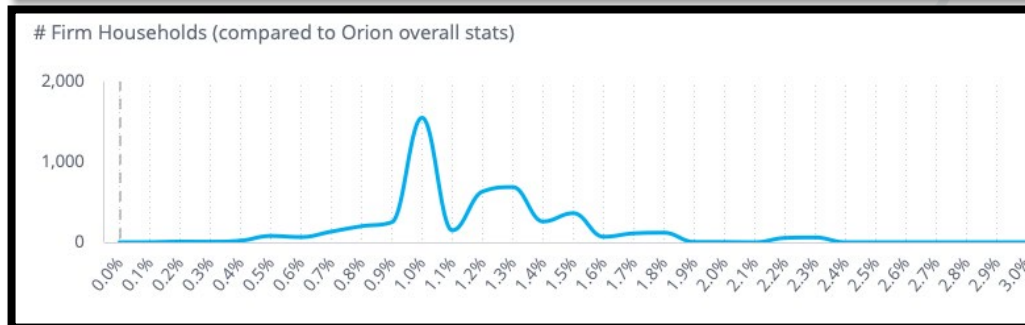


INTRUA

Average Fee

1.12%

Standard Deviation 0.56%

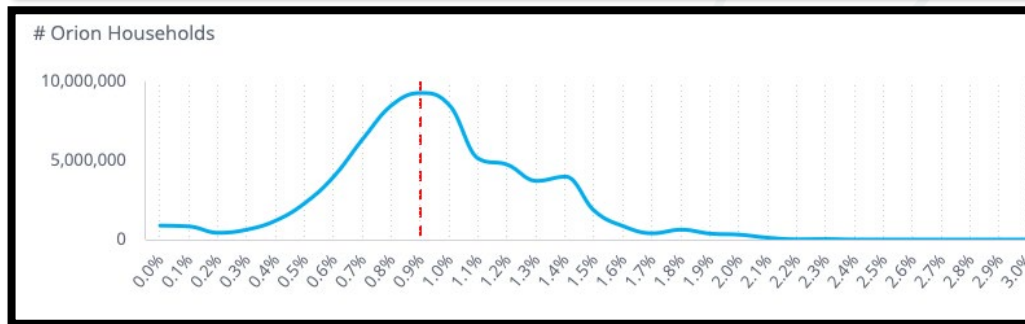


ALL ORION

Average Fee

1.12%

Standard Deviation 3.13%





Building a Scalable Plan

Revenue: Recurring vs. Non-recurring

Revenue: Non-recurring

- Diversification of revenue streams
- Additional client needs
- Built on Transparency and trust



Building a Scalable Plan

Leverage: People, Processes, and Technology

People:

- Building a team
 - What are your skills?
 - What is lacking?
- Role specialization and delegation
 - Task-based
 - Specialty-based
- Examples
 - Angie Herbers Diamond team
 - Lead and Support Advisor
 - Ensemble - no individual clients



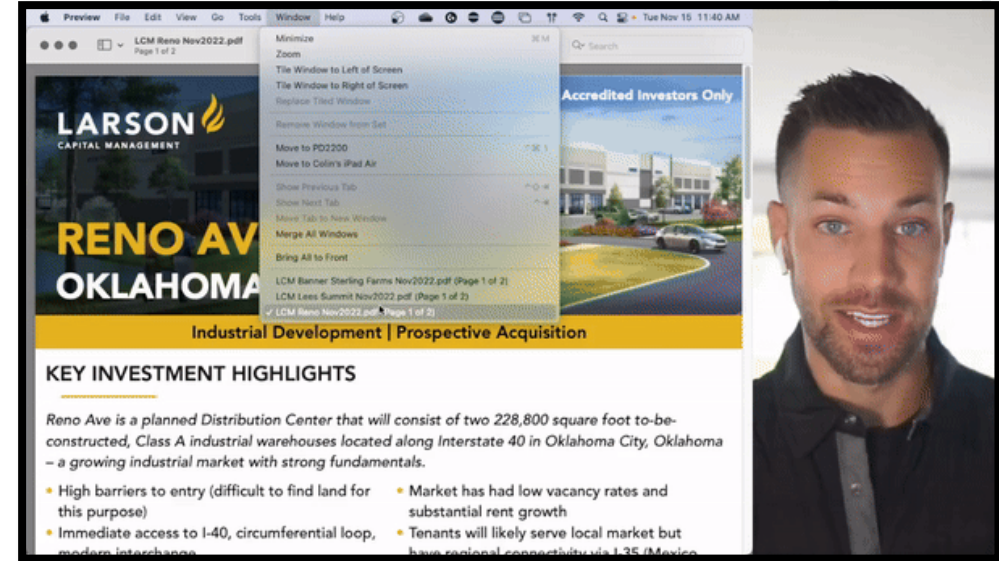


Building a Scalable Plan

Leverage: People, Processes, and Technology

Streamlined Processes:

- What activities are repeatable. Can any of these be:
 - Templated - Copy and Paste first meeting
 - Automated? AI'd?
 - Delegated?
- Future Larson/Intrua platform: Client Onboarding via DocuSign that feeds directly into CRM



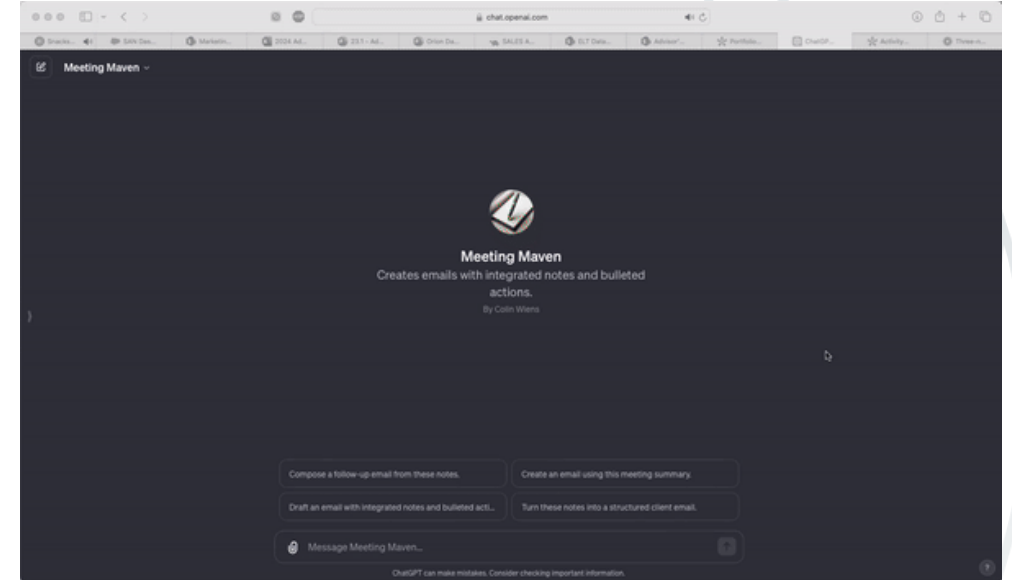


Building a Scalable Plan

Leverage: People, Processes, and Technology

Technology:

- Examples:
 - Calendly / Bookings/ Acuity Scheduling (no more two hundred calls and emails - back and forth)
 - DocuSign - no more print, mail, scan. No more reminders (auto reminds)
- Next Wave:
 - Meeting note taking - Fireflies.ai / Read.ai
 - We all know the impact that this has





Financial AdvisorTech Solutions Map

JANUARY 2024

Latest version available at: [kitces.com/intechmap](https://www.kitces.com/intechmap)

FINANCIAL PLANNING

FINANCIAL PLANNING

eMoney MoneyGuide RightCapital manycytree NavPlan
 iCapital ExecPlan inStream RR Plan Tech Hub
 WEALTHCARE voyant wealthtrace MAXIFI

PLANNING LIGHT

@advisys NewRetirement TIFINWEALTH SECF
 nebo GMD KANASSA Carrol Group Savology
 ProjectionLab

SPECIALIZED PLANNING

RETIREMENT

INCOME SOLVER RA Bucket Bliss COLLECTOR
 timeline SSANALYZER MAXIMIZE SOCIAL SECURITY Social Security Assesstools
 Income Discovery TheBigPicture AnnuityCheck INCOMECOORDINATOR

ESTATE

Vanilla Benchmark Yourfolio Member Cruncher

LEGACY

LifeSite Helen's Plan LegacySkills everplans
 prism Trustworthy

TAX

Integratplan Bloomberg BNA CFS [TAX] CLARITY Planner CS
 CORVEE TaxCam

EQUITY COMP

myStockOptions.com StockOpter trajecto

EDUCATION

College Aid Pro CSLA TECH FINED Education Estimator
 CFS payoff+

CASH MANAGEMENT

Flourish MAX R&T advisor cash SKYVIEWWZ

HEALTHCARE/MEDICARE

65 AVANTE Healthpilot caribou HealthWise

OTHER

fpalpha CHARITYVEST REAL ESTATE FINANCIAL PLANNER FFI Sora
 Special NeedsMap CFM Carefull optivice Onramp

INSURANCE INTELLIGENCE/METRICS

LISA Veralytic WINN

INVESTMENT MANAGEMENT

PERFORMANCE REPORTING

ALBRIDGE AssetBook Rebel roboadvisor BLAZE
 Schwab Advisor Portfolio Connect™ FLYER Smartleaf
 FIRST RATE POWERADVISOR LIC SOFTPAK LIFYIELD

TRADING/REBALANCING

PORTFOLIO MANAGEMENT

ORION FINANCIAL Office Black Diamond
 office Capitect Profile SMARTX OBJECTW
 ALPACAWISE Libretto simplify ADDEPAR
 Advisor Advisor360 digit SYSTEM Vestmark
 Finfolio blueleaf ORION Pontora AdvisorArch

CUSTODIAL PLATFORM

Interactive Advisors Westhedge METX Altus
 QIKOS RAYMOND APEX
 Investment for Advisors DIVERGENT ASSET-MARK ADVISORSHIP entrastory

INVESTMENT DATA/ANALYTICS

KIMBERLY YCHARTS kwant Bloomberg Terminal PORTFOLIO VISUALIZER
 FACTSET FMO Dimensional koyfin REFINITIV AdvisorLab
 Wealthbox Aladdin CFRA CHARM FINANCIAL Zephyr
 Windham Labs boardT vantage Vantage VettaFi Localy Needles
 BlueVantage FeeNetika zerofactorsion Partnerwise equisoftfund
 BLUE WAVE ORTEC canoe BITA magnifi indexone
 ALLDAR ADVISORFIELD FinChat MarketScribe

ESG/SRI

YourStake Analytics CLARITY AI ethos

401(K) IMPLEMENTATION

Betterment Vestwell FIDUCIARY HELD BY S&P

RISK TOLERANCE

FinMetric DataPoints TOLERISK ProctRisk finvision ONPOINT
 STRATIFI PRO PRO Digital Preferences MARKETWISE

STRESS TESTING

Marston ORIS FABRIC ROUNDO finvision ONPOINT

ACCOUNT AGGREGATION

ALBRIDGE Intrepid Marston ETNA
 PLAD Broadridge Aquilata SCFC FusionIQ OnBoard
 Money ARCH maestro AdvisorEngine Nest Wealth

DIGITAL ONBOARDING

CLIENT ENGAGEMENT

CLIENT MEETING SUPPORT

Mobile Assistant Advisor Copytalk Video Conferencing Services FinMate AI

AI ASSISTANT

unblu COGNICOR

CLIENT FEEDBACK

ABSOLUTE NEXA PRACTICE INTELLIGENCE

CLIENT DATA GATHERING

Precise Jotform Transpondent LifeArcPlan

BEHAVIOR ASSESSMENTS

DataPoints Financial QIA Money Changer ROL
 Unifi FINANCIAL LIFE STAGE INSIGHTS ATLAS POINT
 Qualitate INVESTING WEALTH wealthify

ADVICE ENGAGEMENT

PATHFINDER knudge asset+map visitwealth
 LUMIANT BENITO InvestSuite NOVIFLAK
 ForwardLane CurrentClient

CLIENT PORTAL

eMoney InvestSuite SUMMITAS Financial Monarch
 CRED BLACK eVestech KUBERA CENTOLE

SCHEDULE APPS

Calendly OnceHub acuity:scheduling Bookings
 YouCanBookMe GReminders EngageWare

BUSINESS DEVELOPMENT

PROSPECTING

CATCH LIGHT identified

ADVISOR LEAD GEN

smartasset ZOE RAMSEY WIRRAMISOR FEEDONLY
 Wealthramp Financial Advisor Advice Chaser INVESTMENT FIRMS
 planswell indyfin rainbox HARNESS WEALTH wealthfinder
 Lasso ADVISORFINDER MyPerfect DATALIGN moneyskills

DIGITAL MARKETING

fmg LIBRARY TRAVEL STAFF MATCHING HubSpot advisorsstream
 Broadridge Levitate CLEARANOMICS hearsay Lead Pilot
 Wealthvoice LEAD STACK ADVISOR FME X Advisor I/O
 Testimonial VETTER denimsocial Rhythmsocial placid
 Seismic VettaFi Advisor Perspectives Veriday galafully one
 WEALTH I/O MarketDesk AMPLIFY MyNameFlow

SALES ENABLEMENT

Nitrogen ADVISORWORLD 401(K) PROPOSALS
 capintel V R Q L Elements PLANPRO
 invyza equisoft/analyze fiduciary
 paraplanner.ai in Charge

OPERATIONS

CRM

REDTAIL Wealthbox Advisor360 AdvisorEngine
 Tamarac Microsoft Dynamics 365 ProTracker Software
 Less Annoying CRM SmartOffice NEXJ equisoft
 GORILLA 5

CRM OVERLAYS

XLR8 Practifi SSC SKIENCE
 shellblock redcapture

ADVISORY FEE BILLING

Advisor BILLFIN bill SMART KX ADVISOR BOB BILLFIX

COMPLIANCE

Smartria RainBox ORION ComplianceAlpha Reglid
 FIN Compliance LA MEER INC. FILE 13F RED OAK RIA
 MCO Joot Investorcoe Hadrius complet

MANAGED SERVICE PROVIDERS

CLOUDSCALE 365 Visory CYBERSECURITY
 RIA WorkSpace venn adelarisk Advisor Armor
 FUSIONNETIX wht FCI Buckler

DOCUMENT MANAGEMENT

FORMS MANAGEMENT

Worldox Laserfiche netdocuments
 Paperclip Finity360

ADVISOR DATA WAREHOUSING

PIPELINE QUIK agreement

E-SIGNATURE

DocuSign Dropbox Sign RightSignature Adobe Sign

CLIENT FILE SHARING

NativeVault EGNYTE
 box Sharefile
 CoreConnect S Dropbox

WORKFLOW SUPPORT

Docupace ADVISOR TOUCH
 HUBLY finpace
 asana ABSOLUTE

COMMUNICATIONS ARCHIVING

smarsh globalRELAY erado Message Watcher REDTAIL
 MirrorWeb MyRepChat Pagefreezer presluts

BUSINESS INTELLIGENCE/METRICS

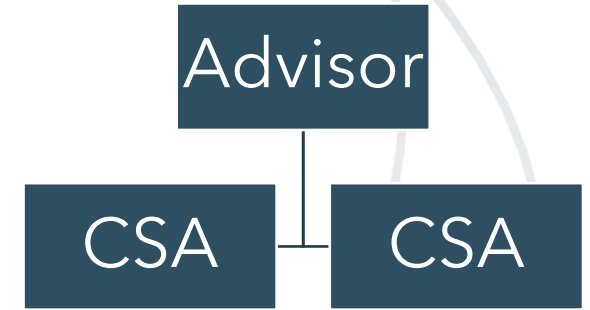
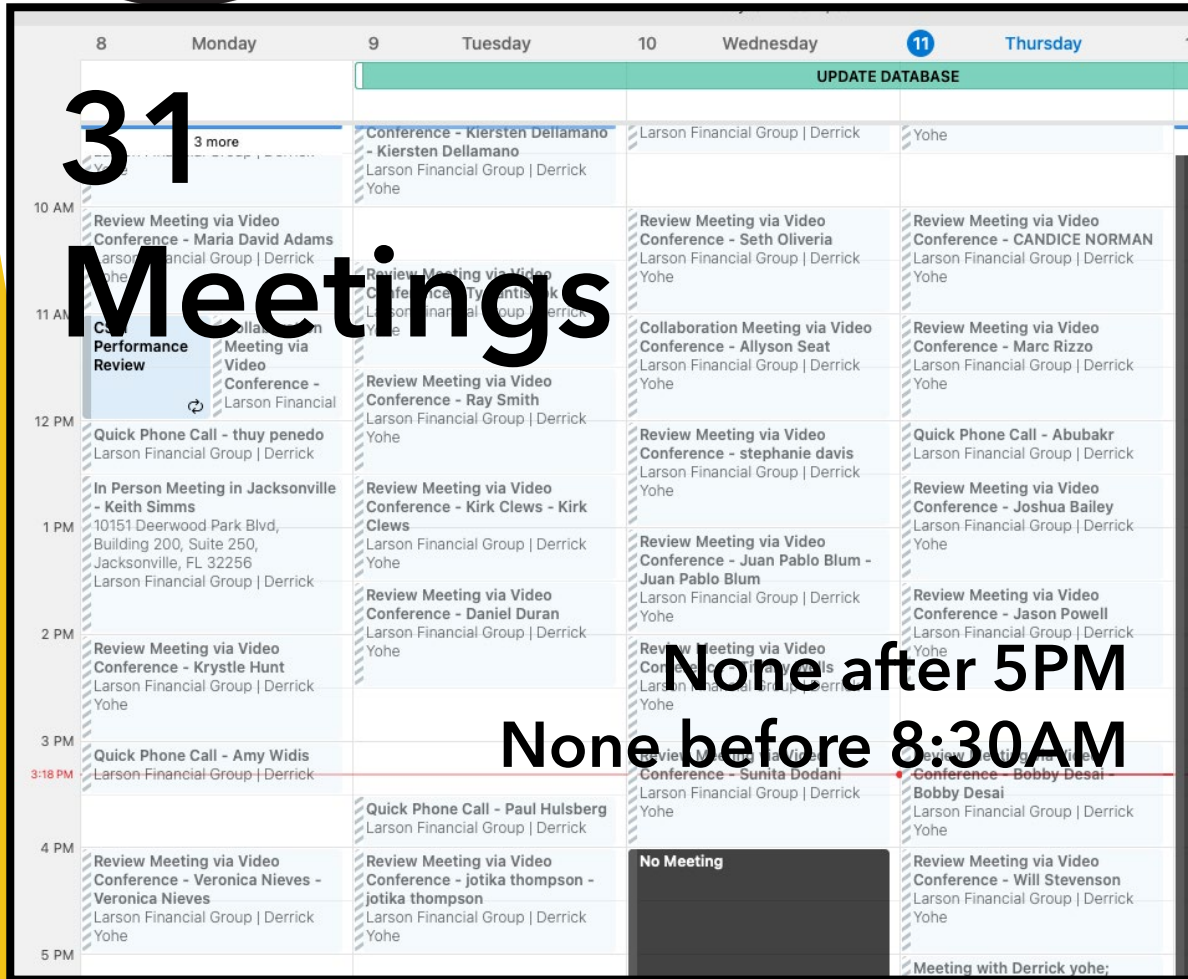
truevision 3Xequity Advisor Clarity





Building a Scalable Plan

Successful Case Studies of Scalable Practices



Advisor	NPS	# Participants
	83	29
	82	39
	81	59
Derrick Yohe	80	152
	80	140
	78	32
	74	77
	67	49
	66	71
	64	64
	64	56





Building a Scalable Plan

Successful Case Studies of Scalable Practices

Example:
Calendaring

TEAM/RATING		CLIENT CONTACT INFO			(Billable) AUM as of 12/31/2022	AUM %	2022 Recurring	2021 Mtgs	2023 Mtgs Actual	
Advisor	Client Rating	Client Rank	Last	First	Spouse					
Colin	3.95	41	Balsubramanian	Ram	and Leena	\$480,000	1.00%	\$8,870	4	2
Colin	1.00		Bass	Caitlin	and Alban	\$22,700	1.00%	\$2,442	4	0
Colin	5.95	3	Berman	Ron		\$1,984,000	0.80%	\$16,360	4	3
Colin	2.45	36	Bleau	Kathy		\$699,115	1.00%	\$6,991	2	1
Colin	0.00		Borde	Davin	and Deepa					
Colin	5.25	10	Boris	Neil	and Adena	\$1,260,700	0.90%	\$12,954	4	2
Colin	5.85	20	Bosak	Jodi	and Steve	\$999,578	0.90%	\$13,117	4	1
Colin	5.95	13	Brockhurst	Alan		\$1,074,200	0.90%	\$11,345	4	1
Colin	5.75	22	Cain	Rick	and Jackie	\$997,150	1.00%	\$13,362	4	1
Colin	0.00	58	Campbell	Duane		\$0		\$0	1	0
Colin	0.30		Chazr- Alvarez	Frances						
Colin	4.45	31	Chen	Allan		\$754,700	0.75%	\$6,455	2	2
Colin	3.45	17	Chin-Lue	Roland	and Lisa	\$897,900	0.90%	\$8,455	2	1
Colin	0.70		Cruickshank	Randy	and Gale	\$201,000	0.50%	\$1,065	2	0
Colin	0.75	52	Dean	Phillip	and Jennifer	\$39,982		\$2,000	1	1
Colin	0.70		Donaldson	Chris	and Johnna		1.00%			
Colin	3.65		Fishman	Matt	and Suzanne	\$390,700	1.00%	\$7,769	4	0
Colin	5.45	9	Florez	Camilo	and Patricia	\$1,784,000	0.50%	\$9,235	4	1
Colin	1.40	45	Galante	Dan	and Diana	\$225,600	1.00%	\$4,756	2	0
Colin	1.20	50	Gasiorowski	Keri		\$190,900	1.00%	\$3,909	2	2
Colin	7.95	1	Gupta	Mohit	and Vasundhra	\$2,472,000	0.70%	\$18,509	4	2
Colin	4.45	18	Hamilton	Paul	and Faith	\$1,209,200	0.80%	\$9,878	1	0
Colin	3.15	59	Hill	Taryn	and Andrew	\$295,600	1.00%	\$6,161	4	2
Colin	0.75	48	Hill	Dustin	and Kristen	\$10,700	1.00%	\$2,107	2	2
Colin	1.20	53	Hoover	Arik	and Kenya	\$232,100	1.00%	\$4,221	2	3
Colin	3.50	23	Johnson	Vanessa	and Bryan	\$872,100	0.90%	\$9,349	2	1
Colin	6.20	16	Judd	Randy	and Sue	\$2,817,200	0.70%	\$19,720	4	3
Colin	0.50		Kinaga	Jennifer	and Mike					
Colin	0.95	61	Koirala	Prashanta	and Ruma	\$0		\$2,500	2	0
Colin	2.25	40	Lee	Joanne	and Jason	\$291,700	1.25%	\$5,403	2	0
Colin	3.65	25	Lopez	Pablo		\$401,400	1.25%	\$8,980	2	1
Colin	6.20	7	Mannuel	Jim	and Gina	\$2,127,800	0.75%	\$15,956	4	2
Colin	3.95		Mathur	Dheeresh	and Prema	\$951,300	0.70%	\$7,226	4	3
Colin	3.20	32	Milas	Z	and Alison	\$603,180	1.00%	\$6,602	4	2
Colin	4.45	24	Mir	Hassan	and Zunera	\$800,700	0.90%	\$9,989	2	2
Colin	6.95	29	Mohanlal	Vresh	and Vijta	\$1,631,300	0.70%	\$12,973	4	3
Colin	0.75	49	Molinari	Alexander	and Sara	\$0		\$2,000	4	1
Colin	5.25	15	Montaldo	Tom	and Jill	\$1,275,700	0.90%	\$12,801	2	2
Colin	1.15		Murphy	David	and Karen					
Colin	0.70	63	Nguyen	Kim		\$0		\$3,000	4	0
Colin	0.00		Patel	Pankil	and Heer					
Colin	0.00	64	Patel	Parag	and Payal	\$0	1.00%	\$750	1	1
Colin	6.20	8	Pfeil	Judi		\$2,041,700	0.75%	\$15,313	4	2
Colin	0.70		Qamar	Shahid	and Mahek					

2022 Mtgs	2023# Mtgs Actual	2023 # Mtgs Offered
4	1	4
2	0	1
2	2	2
4	2	4
1	0	1
4	2	4
2	2	2

16	21	20	12	22	19	20	21	20	6	22	17
Jan	Feb	March	April	May	June	July	Aug	Sep	Oct	Nov	Dec





Building a Scalable Plan

Successful Case Studies of Scalable Practices

Example:
Technology

The screenshot shows an email client window titled "Alternative Investment Opportunities! - Message (HT...". The ribbon includes "Easy Mail Merge" and "View Templates". A dropdown menu for "Easy Mail Merge" is open, showing a blue circular icon and the text "Easy Mail Merge". The email body contains a personalized message:

Hi ^First^ ^Spouse^ -

Happy Thanksgiving week!

Colin and I like to keep you informe

Kindest Regards,
Kacie

Kacie Rogers
Financial Planner

Phone: 863-940-0000
Fax: 863-877-1223





Application

Answer your "why" and discuss





Next Session starts at 2:15p

“Building a 7-year Strategic Plan”
with Paul Larson





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