

MIKE ROSS

Financial Advisor & Public Speaker

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SPEAKING TOPICS

1. How to Interview New Financial Advisor Candidates — What to Ask and When to Ask
2. What Should You Expect to Pay and How to Negotiate Fees
3. Tricks to Change Advisors Without Ruining Friendships

OUTCOMES

- If the advisor you inherited makes you uncomfortable, the talk will help you find a new one
- The talk will help you decide what services you need from a financial advisor
- If you like the person, not the advice, the talk will help you have both a friendship and an advisor

THE BUZZ

"This isn't some guy who is trying to find new clients. This is a professional speaker telling you how the industry really works so you can find someone who fits your needs."

— Talk Attendee

"If your advisor has left their firm or retired, don't just accept their replacement! Invest the time and find someone who meets your specific needs. It's work, but it will pay off."

— Audience Member



WHY MIKE ROSS?

Almost 50 Years of Experience

The advice comes from almost 50 years of experience with hundreds of clients and thousands of conversations with those clients.

Challenge the Advisor-for-Life Idea

He challenges the idea that the investor should have an advisor for life — changes should come when personal circumstances change.

Experienced and Gifted Speaker

Mike is an experienced and gifted public speaker with 50 years of engaging with audiences.

Real Client Stories

Mike's talks are chock full of stories about actual client experiences.