2024 SGOS Presentation Recap

Thank you to all those who attended this year's SGOS in Hawaii! We were so happy to see all of you get a chance to learn the latest updates with Sound Income Group as well as catch up with all of you in person. There were many different presentations and each one contained relevant information when it comes to keeping your practice on track to meet or exceed your goals.

Below you will find links to the PowerPoint presentations that we covered, and we will be posting the videos on our school website shortly. Please make use of all these materials so that next year you might be featured as one of our Top Advisors, or perhaps even our Advisor of the Year!

SGOS PowerPoint Presentations

Pat Farrell: Sound Income Group Business Review

Pat gave us a light history lesson on Hawaii as well as fun photos of Dave Scranton before jumping into the exciting review of Sound Income Group for the year of June 2023-2024. He reviewed Dave's focus as well as highlighting some important milestones that we have accomplished over the past year.

Click Here to Download Pat Farrell's Presentation https://advisorsacademyschool.com/wp-content/uploads/2024/05/1-Pat-Farrell-SGOS-PPT-5.1.24.pptx

Dave Scranton: Agency Model: Update and New Training

Dave gives an update on the status of his agency building at SFG, the growth over the past two years, the roadblocks that have come up, and the tools his staff has utilized to be more successful.

Click Here to Download Dave Scranton's Presentation https://advisorsacademyschool.com/wp-content/uploads/2024/05/2-Dave-Scranton-SGOS-PPT-4.29.24.pptx

Eric Beyrich: 2024 Equity Update

Eric gave a recap of the equity journey, as we celebrated our fourth anniversary of the equity portfolio, what the markets and portfolio are offering currently, and an outlook into the future. He ends the presentation with an explanation of how we review equities and why we choose what is in our portfolios.

Click Here to Download Eric Beyrich's Presentation
https://advisorsacademyschool.com/wp-content/uploads/2024/05/3-Eric-Beyrich-SGOS-2024-Equity-SGOS-PPT-5.1.24.pptx

Eric Lutton: 2024 Update

Eric gave us a quick recap of the results of the first quarter of 2024 when it came to inflation and the opportunities we had with fixed income. He then jumped into what we could expect for the second quarter of 2024 as far as performance and potential portfolio changes.

Click Here to Download Eric Lutton's Presentation
https://advisorsacademyschool.com/wp-content/uploads/2024/05/4-SGOS-2024-Eric-Lutton-PPT_Final_EL-BC_5.1.24.pptx

Lindsey Cotter & Nathan Cox: Retirement Income Solutions Agency Model

Lindsey and Nathan reviewed their business model, the progression that took place over the past six years, and where they plan to go with their agency now that they have grown from one office to five. They also reviewed the difference of having a standalone model versus switching to an agency model and what tools helped them reach their success as they built their agency.

Click Here to Download Nathan Cox & Lindsey Cotter's Presentation
https://advisorsacademyschool.com/wp-content/uploads/2024/05/5-Lindsey-Cotter-SGOS-2024-Presentation-Final-5.1.24.pptx

Rana Chandler: Sound Income Strategies Business Review

Rana gave us a recap of Sound Income Strategies the past year, some of the roadblocks we've come across, and some exciting updates to our SIS advisor portal and new technology we plan to adapt based on the feedback that we've been given by advisors.

Click Here to Download Rana Chandler's Presentation
https://advisorsacademyschool.com/wp-content/uploads/2024/05/6-Rana-Chander-SGOS-PPT-4.30.24_Final_BC_5.3.24.pptx

Erika Wilson, Sarah Samuels, and Richard Hanna: New Marketing Initiatives & Opportunities

Erika, Sarah, and Richard went over marketing material created over the past year as well as some of the new marketing projects they have been testing out successfully including client testimonial videos, digital takeovers in your office, in-studio video production, new radio program, and much more!

Click Here to Download the New Marketing Initiatives and Opportunities Presentation
https://advisorsacademyschool.com/wp-content/uploads/2024/05/7-Marketing-SGOS-PPT-5.8.24.pptx

Abby Kladivko: Mailer Analysis & Metrics Update

Abby reviewed the 2023-2024 data, highlighting any upcoming trends to mailer campaigns including top mailer proofs, locations, and timing. She also gave an update to our training program, Trainual, and how it will be used in the coaching department as well as a sneak peek into our new metrics website update.

Click Here to Download Abby Kladivko's Presentation
https://advisorsacademyschool.com/wp-content/uploads/2024/05/8-SGOS-2024-Abby-PPT.pptx

If you have any questions on a particular presentation, please contact the speaker directly.

If you have any questions, please don't hesitate to reach out to our coaching coordinator, Jackie Palmer, to schedule a call at (954) 640-4416 or jpalmer@advisorsacademy.com.

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