

Tech Resources



Ryan R Morrissey

Morrissey Wealth Management

*Teaching Paid In-Person Financial
Education Community College Classes*



Kristen Hull

Duncan Financial Group

*Hosting Free In-Person Educational
Workshops in the Local Community*



Michael Collins

WinCap Financial

*Converting \$50K of SmartAdvisor Leads
Into \$100K of HNW Clients With a
Systematic Sales & Drip Marketing Process*



teach:able



50% off first 2 months using code *KitcesSummit50*

Tech Resources



Ashley Murphy

Arete Wealth Strategies Australia

Converting the Best HNW Webinar Attendees Into Clients With Targeted Account-Based Marketing



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[ActiveCampaign >](#)



Aleia K MacDonald

Advanced Wealth Strategies

Generating More COI Referrals by Distributing Tax Season Survival Kits & Cultivating Relationships



Veronica Karas

CAPTRUST

Increasing Referrals by Asking Three Powerful Questions of Every Client & COI

