



The Basics

- Founded in 1991 by Katherine and Peter Vessenes
- Located in Minneapolis, Minnesota
- Vestment Advisors has provided consulting, training, and educational services to thousands of top financial institutions and advisors since 1991.
- Katherine Vessenes has written two books – *Protecting Your Practice* (Bloomberg Press) and *The Compliance & Liability Handbook*. (IAFP Press)
- Katherine and Peter Vessenes have co-authored a new book - *Building Your Multimillion Dollar Practice* (Dearborn Press)
- Vestment Advisors has become a leading consultant and coach to the financial industry because of their “bumper-to-bumper” approach to solving business problems and challenges.
- Vestment Advisors created *Bumper-To-Bumper: The Business Breakthrough* – a two-day workshop where attendees learn about the Eight Disciplines of Business.
- Katherine and Peter Vessenes are popular platform speakers on a wide variety of issues relevant to the practice management of financial professionals. A few of their seminars include:
 - The No-Sell Sale™
 - Superstar Marketing
 - Protecting Your Practice
 - Protecting Your Clients
 - Staffing to Accelerate Growth
 - Variable Annuities from an Attorney’s perspective
 - Turning Average Advisors Into Superstars
 - Using Your Unique Abilities To Improve Performance
 - Incentive Plans The Work
 - 9 Ways To Make Your Clients Fall In Love With You And Never
 - A Marketing Approach To Avoiding Litigation
 - Your Free Stay Out Of Jail Pass
 - How To Bullet Proof Your Office From An SEC Audit
 - The Money Trail™
 - Tripling Your Profits™
 - The 12 Hidden Barriers™
 - The Three Philosophies of Management™
 - Leadership
 - Terrific Teamwork!
 - From Self Employment To Running A Business



For more information call **952-401-1045** or
visit www.VestmentAdvisors.com





Partial Client List

Vestment Advisors proudly provides a wide range of services to companies and associations in the financial services industry. From speaking and training workshops to on-site consulting, Vestment Advisors has worked with some of the countries most prominent financial companies. The following is a partial client list:

- 1st Global
- American Academy of Neurologists
- American Express Financial Advisors
- American Capital Corporation
- Amicus
- Bill Good Marketing
- Cambridge
- Charles Schwab
- Chubb
- Commonwealth
- CRI/Northstar Resource Group
- DataLynx
- ExamCo
- Financial Network
- Financial Planning Association
- First Allied
- Foothill Securities
- Foresters Equity
- Harry Dent's Roaring 2000's
- HD Vest
- Horseshmouth
- IAFP
- IARFC
- ICFP
- IFG-Atlanta
- Illinois CPA Society
- IMCA
- ING
- Investment Centers of America
- National Society of Accountants
- Multi-Financial
- Mutual Service Corporation
- Jefferson Pilot Financial
- Lincoln Investment Planning
- LPL
- Merrill Lynch
- Million Dollar Roundtable
- Minnesota Mutual
- NAIFA
- NAPFA
- New England Securities
- Northwestern Mutual
- Pacific West
- Piper Jaffrey
- Princor Financial Services
- ReliaStar
- Royal Alliance Associates
- Securities Industry Association
- Securian
- Sigma Financial Corp.
- State Farm
- Successful Money Management Seminars
- SunAmerica Securities
- The Equitable
- ValMark
- Vestax
- WS Griffith
- Washington Square

