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# Amy Florian

Expert in life transition.

Innovator in advisor education.

Transformational speaker & author.



# About **Amy**

CEO of Corgenius



TOP *of the* TABLE

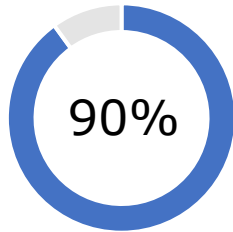
**Amy teaches financial professionals how to support their clients in times of transition, crisis, and grief – skills that few advisors have.**

She has delivered over 1000 speaking engagements across 4 continents, published two multi-award-winning books, and authored or was featured in over 250 articles.

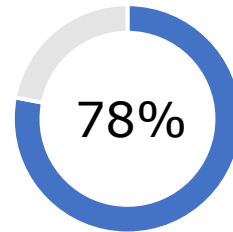
Amy holds a Master's Degree and is a Fellow in Thanatology – the highest level of certification in the field of grief studies. She taught graduate studies at Loyola University Chicago for a decade and has worked with over 2,000 grieving people.

# Why Corgenius?

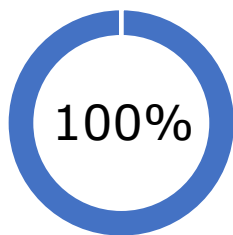
In a follow-up survey of attendees of Corgenius training:



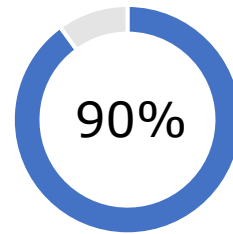
said Corgenius training had a **definitive impact** on their ability to **retain clients**.



said Corgenius training had a **definitive impact** on their ability to **acquire new clients**.



said Corgenius training had a **definitive impact** on their ability to **communicate effectively** in times of transition.



said Corgenius training was **more valuable than other instruction** they had received for client communication and relationships.

## Ask yourself... can you afford to get this wrong?

When there's a death or other loss in a client's family, do you stumble over the stock phrases like everyone else? You probably just lost a client, at least as soon as they find an advisor with the communication skills you lack.

Or do you know how to provide genuine comfort and become a treasured presence in your clients' lives? If so, you just gained a life-long client, and all their referrals.

# Speaking Credentials

Barron's – 4x

Million Dollar Round Table – 3x

FPA National – 5x

FPA Chapters – 42x

Raymond James – 24x

Advisor Group – 10x

AIG – 5x

Ameriprise – 24x

Commonwealth – 8x

LPL – 18x

Edward Jones – 90x

UBS – 36x

Northwestern Mutual – 4x

Wells Fargo – 13x

Merrill Lynch – 4x

Investments & Wealth Inst. – 4x

Advocis – 3x

Schwab – 9x

Buckingham – 5x

Assoc. of Fundraising Profs. – 2x

Nationwide – 13x

Morgan Stanley – 10x

Waddell & Reed – 7x

VALIC – 2x

Western & Southern Fin. Grp. – 4x

Soc. of Fin. Serv. Professionals – 2x

Cetera – 6x

Securities America – 4x

John Hancock – 3x

London Life – 2x

Prudential – 3x

NAIFA National

NAIFA Chapters – 2x

NAPFA – 5x

Edelman Financial Engines

Advisors Excel – 2x

Mutual of Omaha – 2x

Securian – 4x

SunTrust Investment Services – 2x

XY Planning Network – 2x

BMO Life Assurance Company

Guardian Life

New York Life Mainstay

Lincoln Financial Group

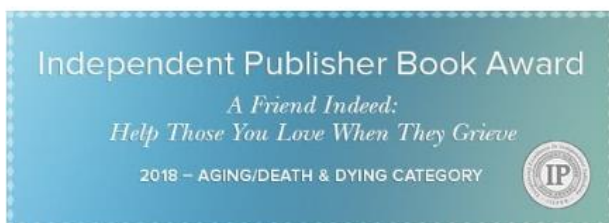
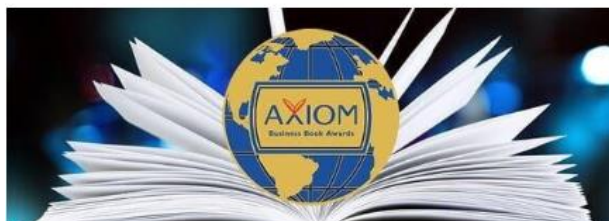
Advisors Circle

Delaware Funds

William Blair

ZeroAlphaGroup – 4x

# Awards



# Feedback

In the 30 years I've been doing this, it was one of the best value add events I have ever been a part of and I mean it. - Sam P.

I was just changed forever by Amy's talk.  
- Jonathan M.

Training that every financial advisor needs, but has never had. - Thomas W.

This was one of the best presentations I've been to in a long time. - Irene B.

This was the best investment I made in myself and career in a long time.  
- Nathan P.

I was hooked after her first minute of talking. - Gatey G.

As someone who attends multiple summits each year, it was the best breakout I have had in years. - Rebekah B.

I have learned how to be a better person, friend, and advisor. - Elaine W.

“Amy is an authority on grief and bereavement, and teaching financial advisors how to deal effectively and empathetically with a grieving client.

**David Drucker, President – Sunset Financial Management**

A real subject matter expert bringing many years of experience in an easy-to-understand language and format. When she presents, it's dynamic, it's educational, and it's extremely powerful.”

**Amir Rafizadeh – Topping Capital**

# Amy's Topics

- Communicating and Coping in Times of Crisis
- Be the Best Advisor in Your Client's Toughest Times
- Life Happens: Are You and Your Clients Prepared?
- Your Aging Client: Issues with Diminished Capacity and Elder Abuse

*...and much more, including customizable topics to fit your specific needs.*

