

To Whom It May Concern:

We have had Larry Klein speak at two of our meetings and every time, our members say his presentation is a highlight of the event.

His grasp of marketing financial services is so encompassing that we have him explain to our college planners how to use their college funding expertise to become the comprehensive advisor to their clients. Our members come to the meetings hungry for marketing ideas and approaches and after they hear Larry, they are satiated.

Rick Darvis, CPA, CCPS NICCP Co-Founder