

Re: AMG Advanced Sales Meeting, St. Simons Island, January 2011.

Sam and Company,

Thank you so much for putting together the Advanced Sales Meeting in January. It was a great use of time, early in the year, both motivational and instructional. The content and speakers were right on target and the fact that you recognized that a change of pace from product focused to *process* focused would be beneficial to top producers was fantastic. Thanks also to all the partners who adjusted their presentations accordingly.

As I mentioned when I spoke the final morning I had two immediate takeaways from the presentations by Steve Barton and Todd Hamlin, relating to the processes and adherence to full and complete data gathering, systematic client reviews, thoroughness in solutions and service to our clients. I wanted to let you know that we immediately hired a Project Manager upon my return who will implement these ideas by taking what I have been doing to the next level and being even more diligent in my client related processes. These ideas completely dovetail with the written business plan I recently shared with my staff for the next 24 months and simply enhanced some of the thoughts and ideas we wanted to implement. Now, after hearing two of the most productive advisors that I know demonstrate how these methods bring them success in their daily practices I can duplicate these habits myself. This morning we ordered two of the books that were discussed during the meeting as well.

All it takes is a willingness to listen, learn and implement. Thanks again for making this meeting different and an exciting way to kick off a new year. Thanks also to all the presenters/ partners that openly shared ideas and efficiencies in the practices with the rest of us. Sam, it's the people that make AMG different and that starts at the top with you and Tricia.

Thanks for everything,
Merv Rudner
Emerald Wealth Management, LLC.
Atlanta, Ga.