NORTHERN TRUST | FlexShares® EXCHANGE TRADED FUNDS

SUSAN DANZIG, LLC
Business Development Coaching for Financial Services Professionals

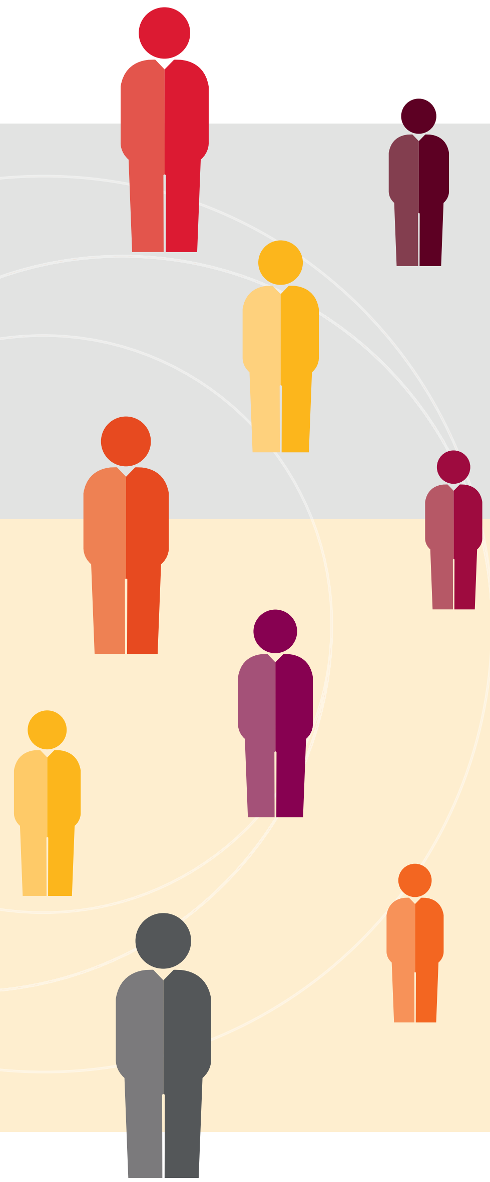
The Race to Scalability:

A Conversation About Scalability and Growth During Challenging Times

Tuesday, November 17, 2020

Time – 11:30-12:30 Pacific Time • **Location** – Virtual, RSVP & Register Here

Please RSVP by Thursday, November 12



With industry consolidation, drive for growth, and benefits of scale, larger firms have an advantage over smaller firms. That is creating a shift in the marketplace as advisors look to increase efficiencies.

We invite you to join us for a virtual conversation and gain actionable knowledge from two experts in the field on:

- How and where advisors are finding efficiencies to better scale and grow their businesses, enabling them to create a better client experience.
- Valuable long-term look at how values, practices and outcomes have changed over a decade of rapid change for the advice business.
- Now is the perfect time to focus on growth and refining your business. You must align your team and practice with your long-term vision.
- Leveraging technology, consistent messaging and communications are key across all communication methods.

Continued

Susan Danzig

Certified Business Development Coach

Susan Danzig has been consulting with financial services professionals since 1997. She helps her clients understand, appreciate and clarify their true value, define their specialization and create effective marketing strategies. Susan's specialty is the brand refinement, messaging and strategic marketing to enhance a business's market value for growth and sale. Susan is a graduate of the University of Colorado in Boulder, a Certified Business Development Coach and a Certified Master Neuro Linguistic Programming Practitioner. A strong contributor to the financial services community, Susan is a National Board Member to the Financial Planning Association.

Laura Gregg

Director of Practice Management and Advisor Research
FlexShares ETFs | Northern Trust Asset Management

Laura Gregg is Director of Practice Management and Advisor Research at FlexShares Exchange Traded Funds, managed by Northern Trust. She is focused on leading the firm's proprietary advisor and investor research and building programs to engage advisors and asset managers through industry intelligence and best practices to help them grow their businesses. She speaks regularly at industry events on a range of business building strategies. Her insights have been published in *U.S. News & World Report, InvestmentNews, Financial Advisor Magazine, CIO Magazine* and other industry trade publications.

Moderator:

John Jordan, CFA

Business Development Executive
FlexShares ETFs | Northern Trust Asset Management

John Jordan is a Business Development Executive with Northern Trust Asset Management. John is responsible for business development and relationship management across all advisory channels in Northern California & Alaska.

Prior to joining Northern Trust, John was with BlackRock's iShares business in San Francisco and was responsible for business development and relationship management for Registered Investment Advisors, Institutional Asset Managers and Family Offices. Additionally, John spent 10 years in various roles with Morgan Stanley and its Graystone Consulting business. He was responsible for advising clients including Foundations, Endowments, Retirement Plans and Private Clients.

John graduated from Saint Mary's College of California with a degree in Business Administration with an Honors Concentration in Financial Services. He is a CFA Charter holder and serves on the Board of Directors of CFA Society San Francisco.