REGISTER ON OUR WEBSITE: www.turningpoint.vision

ALL INCLUSIVE FOR 3 NIGHTS: room, farm-to-table meals and snacks, materials, Internet and Retreat:

$3,500 up to 60 days in advance of a Retreat and $3,700 after that.

The TurningPoint Retreat
—the art of successful succession planning and career transitions

Join Marty Kurtz, CFP® and Elizabeth Jetton, CFP® for an impactful experience designed for you.

Because every successful financial advisor will reach a turning point...

Our goal is to provide a true retreat experience that will offer you time to reflect and to have confidential and meaningful conversations. You will come away with clarity, confidence, a plan and the vigor needed to navigate and embrace the next turning point in your career and life.

A TurningPoint Retreat is for anyone preparing to sell, merge, buy or join a practice, even if you are just beginning to consider what is next for you.

Our Focus:
- Integrate all the considerations you face: how your decisions can serve your business, your team, your finances, your values, your future, your family and your clients.
- Overcome procrastination and the feeling of being stuck.
- Prepare for discovering what is ahead of you.
- Create your own path to transition into or out of a practice, including guidance from our special guest, David Grau, Sr., JD, of FP Transitions.

CopperWynd Resort
Fountain Hills, Arizona
JANUARY 5-8, 2016

Château Élan
Braselton, Georgia
MARCH 22-25, 2016
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In addition to the valuation and the price tag, there is the life, the people, the plans, the hopes and the unknown. How will you merge the best structural decision with what is best for your life and those you care about? Come join us to explore your concerns, your hopes and the unknowns with other professionals at the same turning point. This is our focus. To round out the agenda, we welcome special guest David Grau, Sr., JD, of FP Transitions, to discuss how to build your plan. It is practical and purposeful to invest in this critical time in your life.

CopperWynd Resort
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The TurningPoint Retreat is not a conference. It is a “working experience” to prepare you for your transition journey.

Every Retreat is led by Marty Kurtz, CFP® and Elizabeth Jetton, CFP®. Elizabeth and Marty have been through their own career turning points. Elizabeth has been consulting and coaching financial advisors on their businesses, financial life plans and succession plans for the last seven years since retiring from her own practice.

Marty is in the midst of transitioning out of the successful practice he founded, The Planning Center. He hired Elizabeth to help him in the process. Through that experience they decided, “This is what we want to do! To help advisors get through the important and necessary turning points in their lives and practices...with clarity, confidence, authenticity and strength. Succession planning, to be successful, is more than a price and a buyer.” It is a true journey following a turning point. Where will yours take you?

For more information and to schedule a call, please email us: Marty@TurningPoint.vision or Elizabeth@TurningPoint.vision

To read more about Elizabeth and Marty, please visit our website at: www.turningpoint.vision

"Marty and Elizabeth—thanks for a GREAT 4 days with an amazing group of people! Mark and I are so blessed to have experienced the first TurningPoint Retreat and our personal lives as well as our business are much the better for going on last week’s ‘journey.’"
— Matt Palmer, The Joseph Group

"Thank you again for a wonderful impactful Retreat. It was everything I had hoped it would be...instead of dreading the changes that are coming down the pike, I am excited about them.”
— Alan Ungar, CFP® Abacus Wealth Partners

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