



Pareto Systems Top Presenters

Speaking Topics

Keynotes, Breakouts, Workshops and Webinars

Pareto's Speakers are highly sought-after voices in the financial services industry, delivering proven strategies on how to attract and retain great clients, elevate the client experience, and implement effective systems and processes. With engaging, fact-rich presentations, each Pareto Speaker offers practical insights that resonate with professionals at every level - from individual advisors to corporate leaders.

Drawing on years of experience and a track record of helping financial professionals achieve measurable results, Pareto Speakers specialize in simplifying complex business development and marketing concepts into step-by-step methods that are easy to apply. Whether speaking to elite advisors, wholesalers, or large institutions, their shared goal is to help professionals create clarity, efficiency, and long-term client loyalty through intentional planning and execution.

Pareto Systems

Our Presenters



DUNCAN MACPHERSON, Pareto CEO

Duncan's primary goal is to help Professionals achieve liberation and order in their businesses through step-by-step methodology and execution. Duncan is also an industry best-selling author and has written many books including The Advisor Playbook and The Blue Square Method.

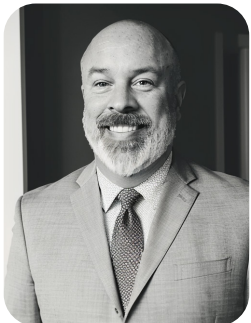
Topics: Harnessing AI for Growth, The Strategic Growth Blueprint, The Multiplier Method, Scaling Up Through Succession



MIKE CAJTHAML, Pareto Speaker

Mike's primary goal is to help Professionals achieve liberation and order in their business. Uncover the factors that shape the strength of your client relationships. By identifying key gaps and opportunities, you can refine your approach to increase engagement, attract quality referrals, and build a business positioned for growth.

Topics: Revealing Exercises to Unlock Client Loyalty, Advocacy, & Growth



JASON WESTOVER, Pareto Speaker

Jason Westover has dedicated his career to empowering advisors, sales teams, and wholesalers across the industry's most prominent companies. As a sought-after speaker and educator, Jason has influenced thousands of financial advisors and wealth managers through his curiosity, strategic problem-solving, and talent for uncovering unique opportunities.

Topic: Harnessing the Power of AI



DR KAREN WEISGERBER, Pareto Speaker

Dr. Karen Weisgerber engages individuals, couples, and families around the issues that present themselves with significant resources, as well as concerns that arise with the distribution of wealth among siblings and across generations. She also provides her expertise to financial and legal professionals seeking to deepen the services they offer through speaking engagements, workshops, and other industry events.

Topics: The Legacy Plan, The Multi-Generational Plan

HARNESSING AI FOR GROWTH

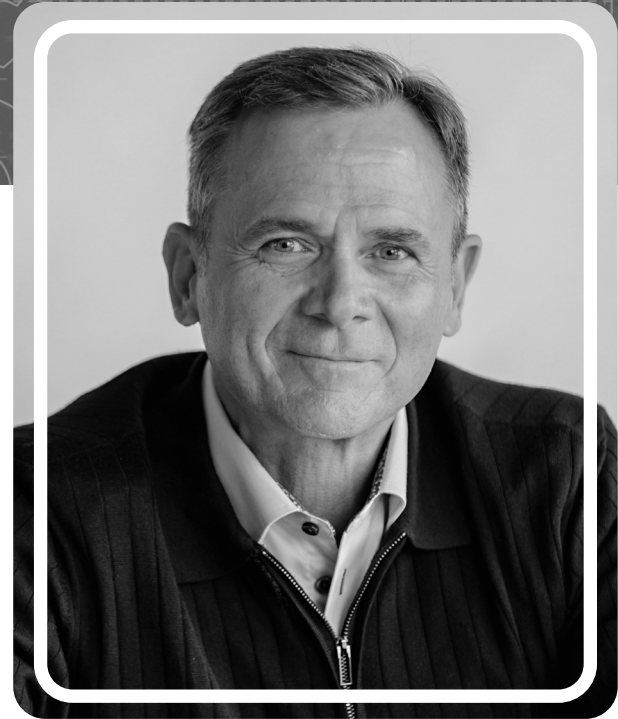
Duncan MacPherson explores how financial advisors can leverage the transformative power of AI to elevate their practice. By integrating principles from The Advisor Playbook and The Blue Square Method, advisors can harness AI to:

- **Streamline Practice Management:** Use AI tools to automate repetitive tasks and create more time for meaningful client engagement
- **Enhance Content Creation:** Leverage AI to generate impactful communication tailored to your clients' needs
- **Scale Personalized Service:** Combine AI-driven insights with the human touch to create a client experience that fosters loyalty and advocacy

THE STRATEGIC GROWTH BLUEPRINT

Duncan's presentation captures the mindset and best practices of top financial professionals, drawing on years of experience with the most effective teams in the financial services sector. Designed for teams striving to elevate their performance, this presentation provides actionable strategies to:

- **Achieve Professional Contrast:** Stand out in a crowded marketplace by enhancing your unique value proposition
- **Streamline Client Experience:** Add efficiency and consistency to ensure every client interaction reinforces your brand
- **Foster Organic Growth:** Unlock referrals by delivering a remarkable experience that turns clients into advocates



**PARETO CEO & SPEAKER:
DUNCAN MACPHERSON**

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REVEALING EXERCISES TO UNLOCK CLIENT LOYALTY, ADVOCACY, & GROWTH



Uncover the factors that shape the strength of your client relationships. By identifying key gaps and opportunities, you can refine your approach to increase engagement, attract quality referrals, and build a business positioned for growth.



PARETO SPEAKER: MIKE CY JR.

Key Takeaways:

- Understand why some clients remain transactional while others fully empower you
- Identify which clients drain your time and energy without delivering mutual value
- Uncover gaps in your client experience that may be limiting new business
- Learn why clients struggle to articulate your value and how to change it



HARNESSING THE POWER OF AI

Harnessing the transformative power of AI can create new efficiencies, elevate the client experience, and strengthen relationships. By becoming a serious student of AI - not to replace the human element, but to complement it - you can integrate technology thoughtfully to enhance your practice and deliver greater value.

- **Enhance client communication by tailoring messaging to increase relevance and impact**
- **Scale personalized service by combining AI-driven insights with the human touch**
- **Build repeatable processes to systematize your business and improve productivity**
- **Reframe relationships by using AI to communicate and demonstrate your value to clients**



**PARETO SPEAKER:
JASON WESTOVER**





THE LEGACY PLAN: ADDING INTERGENERATIONAL PLANNING INTO YOUR PROCESS

Address the incredible opportunity the current intergenerational wealth transfer offers by focusing on family, legacy, and the critical link you provide for a successful wealth transfer. This framework becomes the central differentiator for you as a legacy planner, integrating multigenerational engagements in your practice. In serving and retaining clients through wealth transfers, it solidifies your role as a trusted advisor for the entire family.

Key Takeaways:

- Differentiate your practice as a Legacy Practice
- Embed intergenerational planning into your process
- Strengthen client relationships and connectivity
- Proactively engage and build rapport with the Next Generation



**PARETO SPEAKER:
DR. KAREN WEISGERBER**

THE MULTI-GENERATIONAL PLAN: ENGAGING GENERATIONS & FACILITATING FAMILY MEETINGS

Ensure you to attend to what clients care most about: their family. With a lens focused on preparing for the intergenerational wealth transfer, it offers a template to directly engage with all generations. Providing family meeting topics, definitions of roles and timelines, you will leave equipped to lead your families on the journey of truly successful wealth transfers.

Key Takeaways:

- Differentiate your practice as a Multigenerational one
- Facilitate meaningful, results-driven family meetings
- Build trust by focusing on what the client cares most about: family wellbeing
- Develop meaningful connections with the Next Generation

THE REAL VALUE BEGINS ONCE THE PRESENTATION ENDS

Whether in person or virtual, Pareto Systems presentations go beyond inspiration. They deliver actionable strategies with a clear path for implementation, ensuring financial professionals can achieve real results.

Each presentation is paired with follow-up resources designed to embed the insights into daily business practices.

Book Pareto Systems for your next event today:



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