

A man wearing a dark turban, glasses, and a dark suit with a light-colored shirt and tie is speaking at a podium. He is holding a microphone. The background is blurred, showing other people in suits. The text is overlaid on the image.

**An Introduction  
to  
Bhupinder Anand**

**Global Speaker,  
Trainer, Coach and Author  
&  
Award Winning  
Financial Adviser**

“You are where you are today as a result of  
the choices you made in the past.

What decisions will you make *now*  
to plan for your future?”

*Bhupinder Anand*

# CONTENTS

INTRODUCTION .....	<b>Error! Bookmark not defined.</b>
What are you Seeking for your Event?.....	5
OVERVIEW .....	6
Who is Bhupinder Anand?.....	6
SOME OF THE ORGANISATIONS BHUPINDER HAS SPOKEN FOR.....	7
TYPES OF PRESENTATIONS .....	8
SAMPLE PRESENTATIONS .....	9
SAMPLE OF RECENT SPEAKING ENGAGEMENTS .....	10
TESTIMONIALS & CASE STUDIES .....	13
Some Comments on Facebook.....	16
Feedback Scores from GNP, Guadalajara, Mexico .....	19
FEES AND EXPENSES .....	20
Fees.....	20
Expenses.....	20
IN SUMMARY .....	21
The Next Step .....	21
APPENDIX ONE .....	22
Outlines of Bhupinder Anand’s Speeches .....	22
Preparing for Success in a Changing World .....	22
How to be A Financial Architect.....	22
Creative Retirement Planning .....	23
Getting More and Better Quality Referrals.....	23
TOT (Top of the Table) Made Easy by Moving Upmarket.....	24
How to Work a Room.....	24
Be the Person you Want to be in Ten Years’ Time, Today .....	24
So What Makes you So Different? .....	25
Why and How to Charge Fees .....	25
Smashing the Glass Ceiling.....	26
A Decade of Dreams.....	26
Stand Out by Creating Your Own Personalised Mission Statement .....	27
Make 201x Your Best Year Yet!.....	27

Grow your Business the Easy Way by Working with Professional Introducers .....	28
Prepare a 60 minutes Presentation in Just 10 Minutes .....	28
Gain without Pain – Preparing for Success Ahead of a Regulatory Revolution .....	28
The Power of Words.....	28
Advisor Master Class .....	29
Advanced Advisor Master Class .....	30
Prefer Something Else? .....	30
 APPENDIX TWO	
Sample Videos.....	32
MDRT Annual Meeting, Main Platform, Vancouver, Canada .....	33
Openwork Annual Conference, Birmingham, UK .....	33
MDRT Main Platform, Anaheim, Los Angeles .....	33
MDRT Day, Taipei, Taiwan .....	33
 APPENDIX THREE .....	
Sample Photos.....	34
 APPENDIX FOUR .....	
Smashing the Glass Ceiling Book.....	41
 NOTES.....	
	42

# INTRODUCTION

## What are you Seeking for your Event?

In organising your conference, seminar workshop or other event, you can obviously choose from a huge range of potential speakers. **So, why choose Bhupinder Anand?**

As an experienced speaker, Bhupinder is in massive demand for his speeches to motivate, inspire and educate audiences at every level.

He has a broad and enticing range of speeches and is able to adapt these to almost any given requirement and length. Although financial services has been his main background, and an industry in which he has global reputation, many of his speeches are applicable to any industry or profession with a constant theme of:

- Core principles based on real-life experience
- Practical concepts that are tried and tested
- Transferable ideas and techniques that will make an immediate impact
- Material that is easy to understand and explain
- Engaging the audience through role-plays and interactivity
- Ensuring that delegates are left inspired to make a change in their lives to improve their productivity and sense of self-belief and confidence
- Ensuring that there is a lot of energy put into every speech
- Ensuring that his sense of humour is globally transferable
- He has also served on the organising committee for the prestigious Million Dollar Round Table (MDRT) Annual Meeting Main Platform, so has a clear understanding of what a good speech looks like
- Ensuring that organisers receive sincere compliments and positive feedback for engaging one of the best speakers in the world

*“A presentation from Bhupinder is not just a speech,  
it is a life-changing experience!”*

## OVERVIEW – Who is Bhupinder Anand?

Bhupinder Anand is Managing Director of 'Anand Associates Ltd', a firm of independent financial advisers based in Central London, UK.

After just 14 months as an IFA, Bhupinder was awarded UK 'IFA of the Year 1995'.

He again received the award in 2003, becoming the only Financial Adviser in the UK to win the award twice.

He has personally twice won the award for UK 'IFA of the Year'. Anand Associates has also been awarded Evening Standard 'Best IFA in the Capital'. Bhupinder has authored numerous articles and even presented his own Satellite TV program on Personal Finance.

Bhupinder is qualified to Chartered Status as an Associate of the Chartered Insurance Institute. He is also a 14-year Top of the Table member of the Million Dollar Round Table (MDRT), an organisation representing the world's top 40,000 financial advisers and a member of MDRT for 18 years.

He has an enviable track record as one of MDRT's favourite speakers, having spoken at numerous MDRT Meetings. His sessions are always 'sold out'!

Bhupinder has been a motivational speaker for over 20 years and is highly sought after by international insurance companies wanting to have the very best training for their teams.

Bhupinder is a passionate believer in the value of holistic financial planning and has positioned his company, Anand Associates, to be at the cutting edge of this, with his creative financial and tax planning solutions.

...he was the highest rated out of 58 speakers...

**Although clearly a specialist in financial services, Bhupinder's style of speaking and content is applicable to audiences of almost any type.**

He is increasingly in demand by non-financial services organisations as a motivational speaker and to help employees deliver extraordinary levels of service.

In 2013, Bhupinder published his first book called 'Smashing the Glass Ceiling', an inspirational guide to achieving new breakthroughs in success.

### **Contact:**

Bhupinder Anand

Anand Associates Ltd, 10, Glentworth Street, London NW1 5PG

Tel: +44 207 486 5486 Fax: +44 207 486 5487 Mob: +44 7949 161241

Email: [Bhupinder@anandassociates.com](mailto:Bhupinder@anandassociates.com)

Website: [www.advisormasterclass.com](http://www.advisormasterclass.com)

## SOME OF THE ORGANISATIONS BHUPINDER HAS ADDRESSED



The Premier Association of Financial Professionals®



## TYPES OF PRESENTATIONS

Bhupinder Anand has in-depth experience of delivering many types of speech, including:

- Keynote Main Platform Speaker
- Opening or Closing conference speaker
- Focus Session presenter
- Top producers specialist training
- Workshop facilitator
- Full or half-day training sessions
- Master of Ceremonies
- Practical, transferable content or pure motivational (or a combination of both)

An effective use of his skills may be in a combination of speeches during the conference, perhaps with a Focus Session and a Main Platform Keynote or maybe a Keynote first day and half or full-day session the next day.

*Bhupinder is keen to explore what you want to achieve and then design a program to suit your specific requirements*

All speeches are delivered in a high-energy, thought-provoking and engaging style.

Delegates will be inspired to think about their current circumstances and what they could be doing differently. They will leave with practical ideas that they can implement immediately to have a dramatic effect on their production and their abilities.

**A constant theme of all the speeches is to 'raise your confidence and self-belief'.**

## SAMPLE PRESENTATIONS

Through over 20 years of speaking experience, Bhupinder, has created a suite of presentations for almost any need; the only thing he has no experience of talking on is recruitment strategies, although previous conference organisers have said that many of the principles of relationship building that Bhupinder talks about are very relevant to this subject.

*Most importantly, each and every speech is tailor-made to suit your specific requirements.*

Bhupinder will want to be very clear about your objectives to ensure that what is delivered is consistent with both the theme of the conference the demographic and experience of the audience and your desires for what you want to achieve for your delegates.

### Summary of Bhupinder's current speech titles include:

- Extraordinary Customer Service
- TOT (Top of the Table) Made Easy by Moving Upmarket
- Positioning for Success in a Changing World
- So, What Makes you So Different?
- Branding, Marketing and Positioning -21<sup>st</sup> Century Strategies
- Getting Better Referrals
- How to Be a Financial Architect
- Be the Person you Want to be in Ten Years' Time, Today
- Smashing the Glass Ceiling
- Make this Your Best Year Yet!
- A Decade of Dreams
- Sustaining Success
- Selling More Life Insurance
- Finding and Closing Selling Bigger Cases
- The Power of Words
- Preparing for Success Ahead of a Regulatory Revolution
- Advisor Master Class – 9 hour training programme for financial advisers
- Advanced Advisor Master Class

*See Appendix One (click [here](#))  
for full descriptions and lengths of the above*

## SAMPLE OF RECENT SPEAKING ENGAGEMENTS

MDRT Annual Meeting , Main Platform Speech -	Anaheim, CA, USA (7,500 people) Vancouver, Canada (12,000 people)
MDRT Annual Meetings, Focus Session Speeches -	Atlanta, GA, USA Anaheim, CA, USA Denver, Colorado (Highest Rated Speaker) New Orleans, LA, USA Nashville, TN, USA San Francisco, CA, USA
MDRT Annual Meeting, Connexion Zone, Big Stage –	Philadelphia, PA, USA New Orleans, LA, USA
MDRT Days, Keynote Speeches -	Jakarta, Indonesia (4,500 people) Bangkok, Thailand (2,000 people) Taipei, Taiwan (1,500 people) Manila, Philippines Singapore Halifax, Canada Dubai, UAE Vilnius, Lithuania Athens, Greece Larnaca, Cyprus Warsaw, Poland
MDRT Experiences, Keynote Speech -	Tokyo, Japan (7,000 people) Hyderabad, India
MDRT Top of the Table Annual Meeting Main Platform Speech - Focus Session Speech -	Naples, FL, USA Palm Springs, CA, USA
World Critical Illness Insurance Conference <i>(The only advisor to speak for 4 consecutive years at this conference)</i>	Toronto, Canada Victoria, Canada
MDRT European Convention, Sales Panel -	Athens, Greece
MLC Insurance Forum, Australia, Keynote Speech -	Brisbane Sydney Melbourne Adelaide Perth

Met Life Amlisco, National Conference, Keynote Speech – (Spoken two years in a row)	Bratislava, Slovakia Zilina, Slovakia
Manulife of Singapore, Achievers Forum, Keynote Speech - (Spoken two years in a row)	Istanbul, Turkey Singapore
UK MDRT Day, Sales Ideas Facilitator -	London, England
Tenet Network National Conference, Keynote Speech - (Spoken two years in a row)	London & Leeds, UK
Agent to Advisor Workshop, Great Eastern Life – (Spoken two years in a row)	Singapore
Keynote Speaker, Tenet Annual Business Conference -	Leeds & London
PIBA Annual Conference, Keynote Speech -	Dublin, Ireland
Great Eastern, Life Achievers Forum, Keynote Speech –	Singapore
Malaysian Life Insurance Congress -	Kuala Lumpur, Malaysia
GNP National Conference, Keynote Speech -	Guadalajara, Mexico (1,500 people)
Thames Valley Life and Pensions Society-	Sonning, UK
Sequis Life Annual Conference, Keynote Speech -	Jakarta, Indonesia
ING Life, Sales Conference, Keynote Speech -	Warsaw, Poland
IFPAS Annual Congress, Keynote Speech -	Singapore
Sony Life of Japan, Workshop Facilitator -	London, England
Asia Pacific Life Insurance Congress, Keynote Speech -	Macau, China (6,000 people)
Prudential Top Producers Seminar, Keynote Speech -	Singapore
ICICI Prudential India, Champions Forum -	Agra, India
Commercial Union Poland, Advisor Master Class -	Barcelona, Spain
The U.K. Personal Finance Society Regional Meetings	Throughout UK
Oxford Brookes University, Enterprise Week Lecture -	Oxford, England (spoken 3 times)

FPAS, Financial Planning Congress, Keynote Speech -	Singapore
Personal Finance Society, Annual Conference -	Birmingham, UK
Financial Practitioners National Congress -	Singapore
Max New York Life (of India) - CEO Council Qualifiers Meeting, Keynote Speech	Cairo, Egypt
IFCG Group, Workshop -	Bangkok, Thailand
Aviva, Annual Sales Conference, Keynote Speech -	Warsaw, Poland
AIA Life - Keynote and Focus Session -	Kuala Lumpur, Malaysia (6,000 people)
Society of Financial Advisers - National Conference and Regional Meetings	Throughout UK
Life Insurance Association - National Conference and Regional Meetings	Throughout UK
Openwork Annual Conference, Main Platform Speech -	Birmingham, UK
National Hispanics Agent Network, - Opening and Closing Speaker	Phoenix, AZ, USA
Keynote Speaker, State Farm California Sales Conference -	San Francisco, USA
Special Guest Speaker, Advocis Regulatory Symposium -	Toronto, Canada

## TESTIMONIALS & CASE STUDIES

### Here's what some delegates have to say about Bhupinder Anand's presentations:

"Bhupinder's presentation was incredible. I wish more of my associates had been able to hear it. I thought it was excellent. I have listened to the CD of the presentation 3 times so far!!" *Tom Stow, Unum Povident*

"Bhupinder's presentation focusses on building...great to see." *Derek Good CFP CLU CHFC, Clarica Sun Life, BC*

"It was terrific and contained many good ideas for simplifying the presentation into a format that is easily understood by clients. Very effective." *Ronald Catchick, Cumis Group, Calgary, Alberta*

"I was initially sceptical about paying for a course that I did not know much about. I took the advice of my leaders and made the investment for my education on this information. I am so glad that I did. I did not even drift off once during the full day workshop. The information I have learned is helping me to get more posture, get in front of clients who actually want help and to grow my business as a great leader. I would recommend this course to anyone and everyone, no matter what business you are in." *traceycm@telus.net*

"Bhupinder Anand is a master of marketing, posture and needs analysis"  
[kasandravanmerlin@shaw.ca](mailto:kasandravanmerlin@shaw.ca)

"I found the session informative in a very practical way and I have successfully implemented a number of suggestions from your master class seminar into our practice. I believe that what you are facing in the financial services regulatory environment currently in the UK will be the shape of things to come

ADVISOR MASTER CLASS

### Case Study – Kris Kuah of GE Life, Singapore

Kris was known as an 'ordinary' life insurance agent; for years, she was an average agent. She knew her trade, put in the hours and made a decent living, but was frustrated that greater success seemed impossible.

She then heard Bhupinder deliver his 'Smashing the Glass Ceiling' speech at the IFPAS industry conference in Singapore in March 2010.

She was so motivated by this speech that she realised that she needed to make a change and made a commitment to improve.

So, she signed up for Bhupinder's 'Advisor Master Class' training day being held in Singapore the following month.

In January 2011, she called Bhupinder and told him that as a result of what she had experienced during the conference speech and the in-depth training during the Master Class in April, by December 2010, just 8 months later, she had progressed from being an average agent to the top agent of GE Life in that year.

As a result, she had been nominated as 'Chair of the Achievers Club' and was tasked with finding the best speaker for the forthcoming Achiever's Forum conference for 1,500 GE Life agents and invited Bhupinder to help others to grow.

Bhupinder was keynote speaker at that event and also ran a version of his Master Class for 140 delegates, repeated the following year.

in Canada and has consequently better prepared me for this environment." *Sumit Bose B.Comm., B.A.Hons.(Econ.),CFP, FMA, FCSI, MBA*

"Bhupinder's style of presenting, and his exceptional knowledge of the need for Critical Illness is something all agents in the industry should try go get a hold of. The information is valuable, and will be a great tool to carry with me as I pursue excellence in my career. Awesome stuff!" [rog684@telus.net](mailto:rog684@telus.net)

"The Advisor Master Class helped me to examine my business and make changes that will see me achieve my goals much sooner." *Bernietrudell@shaw.ca*

"The course was very well done. I took so many things from it that I will have to review my notes often because there is too much to implement all at once. This course can take your business to the next level." [jbrozny@shaw.ca](mailto:jbrozny@shaw.ca)

"Information packed day that I know will move my practise to a higher level. Well worth the time, travel and cost. Will definitely recommend to others." *Bob*

"This seminar was the most professional & comprehensive approach to Financial Planning that I ever attended."

"Anyone looking to heighten their client experience and stay competitive will benefit from the Advisor Master Class." *Arminder*

"Having attended a previous event at which Bhupinder was one of the presenters, I felt confident that his Advisor Master Class would be a truly rewarding experience. I was not disappointed. His motivational, relationship-building, and practice management ideas are outstanding and many of them are easily transferable to almost any type of practice." *Alan*

"No Comments. Your programme is perfect." *Paul*

## Case Study – Esra Manrung of Allianz, Indonesia

Esra was a qualifying member of MDRT and doing okay but not great. She felt frustrated that her business was not growing.

In June 2011, she heard Bhupinder deliver his speech 'Top of the Table made Easy by Moving Upmarket' at the MDRT Annual Meeting in Atlanta. That Focus Session attracted a record 1,500 'full house' audience, the normal audience for an MDRT Focus Session being around 500 people.

The session received rave reviews.

Esra was blown away by what she learned in that presentation and decided to implement the ideas immediately. Her level of confidence and self-belief went through the roof as she realised the need to talk to wealthier clients rather than just see lots of people as her manager had been telling her.

As a source of inspiration, she still reads the manuscript of the speech just before very client meeting.

By the end of 2011, she had qualified as a TOT Member of MDRT, raising her production at least 6 times!

Given this huge impact, Esra has since arranged for Bhupinder to speak in Jakarta, Indonesia to help her colleagues to also grow.

"Advisor Master Class was easy to follow and gave me a few ideas that could be implemented immediately. It has given me motivation to set new goals and may have changed my future." *Snigdha Malik*

"With the Bhupinder's approach and the posture he takes with people it's no wonder he doesn't have to handle client objections!" *BEN\_BIEL@yahoo.ca*

---

### Case Study – MLC Insurance, Australia

---

MLC is Australia's largest insurance company and each year they run a 'Life Insurance Tour' hosting breakfasts and lunches across Australia to educate advisers on MLC products and encourage them to improve their business.

The previous year they had renowned cricketer, Shane Warne, as their keynote speaker. In 2009, in the midst of a global recession, they felt they needed someone who not only had personality and stage presence but also carried gravitas and business credibility.

They scoured the world to find someone to meet this challenge and invited Bhupinder to be their keynote speaker at 8 venues in 5 cities.

The presentations went down a storm, with 75% of reviews rating good and 20% excellent.

---

---

### Case Study – MetLife, Slovakia

---

Having seen Bhupinder appear on a sales idea panel at the MDRT European Meeting in Athens Greece, the National Sales Manager of MetLife Slovakia, invited Bhupinder to address the company's Annual Sales Congress in Bratislava in 2012.

The event sparked such enthusiasm that Met Life saw their production figures jump as a direct result of agents using Bhupinder's ideas.

Rather than seeking another speaker for their 2013 conference, MetLife re-invited Bhupinder to be their keynote speaker to impart further knowledge and motivation.

---

## Some Comments on Facebook

**Cynthia Toh**

Is overwhelmed with awe after a day & a half of creative bombardment from UK top IFA Bhupinder Anand.. Gonna bring him back to benefit more of my fellow men by endorsing him strongly to top mgt!!! Priceless investment of my time & money!!

08 April at 13:00 via iPhone · Like · Comment

Selena Dolphin Wong and 3 others like this.



**Alvin Ong Ding Wei** It was indeed a very good course. This is the speaker I really must say he's dedicated and passionate about his teachings. He simply ignore the allocated time he was given to end the class and make sure he went thru everything before he call it a day! A question and he gave 30 min of his time to answer it professionally! Thank you Ivan for your reminder to attend this course! I'm sure all of us who attended his course benefitted from him!

08 April at 17:16 · Like · 1 person



**Alvin Ong Ding Wei** Money was definitely well spent!!

08 April at 17:17 · Like



**Cynthia Toh** If u ask me Alvin..I think this is the best course I have attended all the 6 yrs of my career.. he left me thirsting 4 more!! U r very blessed 2 hv attended it only in your 2nd yr! It's holistic & gives a totally new twist to how we should present, run our practice etc. The 1st time I heard him in MDRT in 2007 I rated him as the top speaker. He told me himself privately that he was rated no.1 that yr for delivering real substance & not some fluffy material we can't really apply. This is what I mean by authentic & sincere sharing.if there is only 1 course I could endorse, this is it. Let's break our glass ceiling in 2011! P/s: dun 4get 2 thank me 4 endorsing Bhupinder so strongly to Ivan.haha!!

08 April at 17:28 · Like · 1 person



**Alvin Ong Ding Wei** Yes indeed Cynthia, I'm indeed very blessed to be able to attend his course just in my 2nd year!! I really enjoyed myself and so far I also rated him as the best speaker so far in my 2nd year career! I shall thank you, you Cynthia for such powerful endorsement too!! You know? Thank you, you! Haha

08 April at 17:54 · Like · 1 person



**Wei Rong** me too ! me too !!~~

09 April at 05:39 · Like · 1 person



**Mei Ting Teo** Wah! Seems like i missed out alot!

09 April at 08:48 · Like



**Alvin Ong Ding Wei** of course u did..

09 April at 10:30 · Like



**Cynthia Toh** Mei Ting..u missed out the world! The world stopped when Bhupinder was teaching..nobody was conscious of the time & many of us even stayed over for "extended" encore training, which Bhupinder graciously agreed to. 1st time I see a crowd of ppl staying back after a 7pm ending time just to get more out of him!! In both Ivan & my opinion, the best external trainer course we hv ever attended over d full span of our career (9 & 6 yrs, respectively!!!)!! Really hope 2 bring him back soon!

09 April at 12:56 · Like · 1 person



**Alvin Ong Ding Wei** I shall upload the picture of everyone Gathering at the GE lobby to learn more after his course from him even at 7pm!

09 April at 12:58 · Like · 1 person



**Cynthia Toh** Alvin I can see u r suffering from Bhupinder training withdrawal syndrome..hahah! Promise I will write 2d mgt 2 seriously consider bringing him back!

09 April at 13:01 · Like

**Alvin Ong Ding Wei** Haha! Thanks in advance Cynthia for your nice gesture and initiative!

09 April at 13:02 · Like · 1 person



**Bhupinder Anand** I'm totally honoured by this incredible feedback! Thankyou. I absolutely loved the conference and the training day. It was a lot of fun and the chance for me to crack a few jokes and share some funny stories while also sharing practice management and sales ideas. I can't believe how many people stayed on for the 'extra' session, I only expected about 4 or 5, I think there were about 40! It was a great audience and I am very happy to 'have made a difference'. The rest is now up to you - to both implement the material, finish the exercises...and convince management to bring me back! Your personal feedback and comments on the day were also motivating, thank you. I look forward to a return visit!

15 April at 14:08 · Like · 2 people



**Cynthia Toh** Wow Bhupinder ..I'm so honoured to have your comment on my wall!!! As you can see from the overwhelming responses on my wall (and much more buzzing outside my wall)...we are all literally "dying" to have you back again to share your expertise, after having benefitted so tremendously in that 1 and a half days! You wouldn't believe this..many of the participants who went for your class are still talking abt your training even after 1 week..you certainly left all of us thirsting for more! I applied many of your powerful concepts during the week..and am already beginning to see very promising results!!! I just spoke with Kris this morning and there is a very high probability we will have you back, I heard it's sometime in July to conduct your Advance master advisor class..I'll definitely be the 1st one to sign up! Thanks so much for your generous sharing and innovative ideas...it was priceless and we are all hoping to see you back very soon!! :))

15 April at 14:25 · Like · 1 person



**Mike Hosc** Yes n thk u to Cynthia cos' of your highly comment I search high n low on Bhupinder Anand and its great to know this master ... :)

15 April at 14:34 · Like



**Selena Dolphin Wong** Hi Bhupinder!!! PLEASE COME BACK TO SINGAPORE SOON!!!! PLEASE!!!

15 April at 16:44 · Like · 1 person



**Ivan Chee** Bhupinder, in my opinion I rate you the best trainer I ever encountered so far! Authentic, real stuff without any fluff. Really practical sales concept and ideas that can be implemented easily into our practice.

15 April at 17:03 · Like · 1 person



**Alvin Ong Ding Wei** Very professional & well-liked trainer!

15 April at 17:08 · Like · 1 person

Continued...

**Cynthia Toh**

is "suffering" from BTWS (Bhupinder Training Withdrawal Syndrome)..sufferers of BTWS will find themselves speaking about architecture, umbrellas, sunken treasures and the like at an alarming frequency..the antidote for BTWS is to attend the master advisory class wherever in the world it is conducted!!!

15 April at 14:42 · Like · Comment

Alvin Ong Ding Wei, Selena Dolphin Wong and Mike Hosc like this.



**Eric Feng** Hahahaha.. tell us more about what this program is about. Sounds interesting. They teach you to talk about anything under the sun?

15 April at 18:37 · Like



**Cynthia Toh** Eric..on the contrary..Bhupinder is an internationally renowned & highly sought after charismatic speaker in our industry (worldwide) who has achieved the highest level of mastery with words, NLP and human psychology (which can be practically applied in our industry)..he has infused this mastery into all aspects of our practice with extremely innovative yet practical concepts, ideas and choice of language which is engaging and humourous all rolled into one. No fluff, only authentic and mind blowing concepts that can be practically applied in an engaging, stimulating and fun way that will keep our clients and prospective clients magnetised (and perhaps hypnotised...hahah)...Which is why Bhupinder can command a high 5 digit fee in a single day!!!

As for the details of the program ..it's copyright of the master..so I shall keep it a mystery here..hehee!!

15 April at 19:09 · Like · 1 person



**Eric Feng** Wow, looking at what you have just said, I am sure it will be no problem to at least double your sales :)

16 April at 01:15 · Like



**Cynthia Toh** Thanks but it's really not about doubling or tripling sales .. It's about breaking the glass ceiling in human interactions to achieve a quantum leap in our practice, so the sales process becomes more effective with better quality appts & prospects. Definitely beats all the other fluffy courses out there which don't know what we need precisely! :)

16 April at 02:06 · Like



**Eric Feng** So what are the top three things that life planners need right now i.e. their most pressing issues?

16 April at 11:20 · Like



**Cynthia Toh** Eric..it's 4 u to find out since u r one of our trainers with your UYC course being conducted in my coy. Good luck!

16 April at 12:55 · Like



**Alvin Ong Ding Wei** The top thing I need right now is to equip myself with more skills in this business from people like Bhupinder, a well-respected speaker. Cynthia, i guess you are right. It's never about doubling or tripling our sales, it's about breaking the glass ceiling in human interactions to achieve a quantum leap in our practice. When we know how to interact and understand our interested audience better, it is no longer a sales but a real financial planning through a professional way.

17 April at 05:23 · Like · 2 people



**Cynthia Toh** U are right Alvin..as Bhupinder is a practitioner himself in our industry, he is able to come up with very concise and practical materials that have really been tested out by himself and which has worked and is still working miracles for his practice (as attested by his stellar and consistent top performance in UK for over a decade)..with this definitive course which covers much more than just about effective communication and charisma, but explosive advisory, sales process, practice mgt and NLP concepts that displays a mastery over the human psychology, I think Bhupinder has rightly nailed it all and created an all encompassing program that we all NEED and WANT. Best part of it,

## Feedback Scores from GNP, Guadalajara, Mexico

Encuestas Tabuladas 674

Contenido Expositor

	Contenido	Expositor
Plenarias	Bienvenida y Objetivos 2011 / Enrique Castillo	8.31 8.46
	Panel de DA's / Adolfo Díaz, Francisco Zazueta y Eduardo Melito	8.45 8.64
	Testimonial / Bhupinder Anand – MDRT	9.66 9.72
	Plática Motivacional / Ken Carter	8.78 9.05
	Mensaje de Clausura – Rafael Fronjosá	9.18 9.25

## Summary of Feedback Scores from MLC, Australia

Score	Number	Percentage
Excellent	709	76.6%
Good	194	21.0%
Satisfactory	19	2.1%
Poor	3	0.3%
<b>Total Responses</b>	<b>925</b>	<b>100%</b>

# FEES AND EXPENSES

## Fees

The reality is that no two events are the same and as each speech is tailored to suit the specific needs of the organisers, there is no hard and fast numbering to Bhupinder's speaking fees.

The reality is also that Bhupinder's fees are not at the low end of the scale but are better measured in the value that is given to the audience, as evidenced by the raising of sales productivity by many companies that have engaged him.

Bhupinder has *never* had a bad review and always delivers huge value for money. The return on your investment is dramatic.

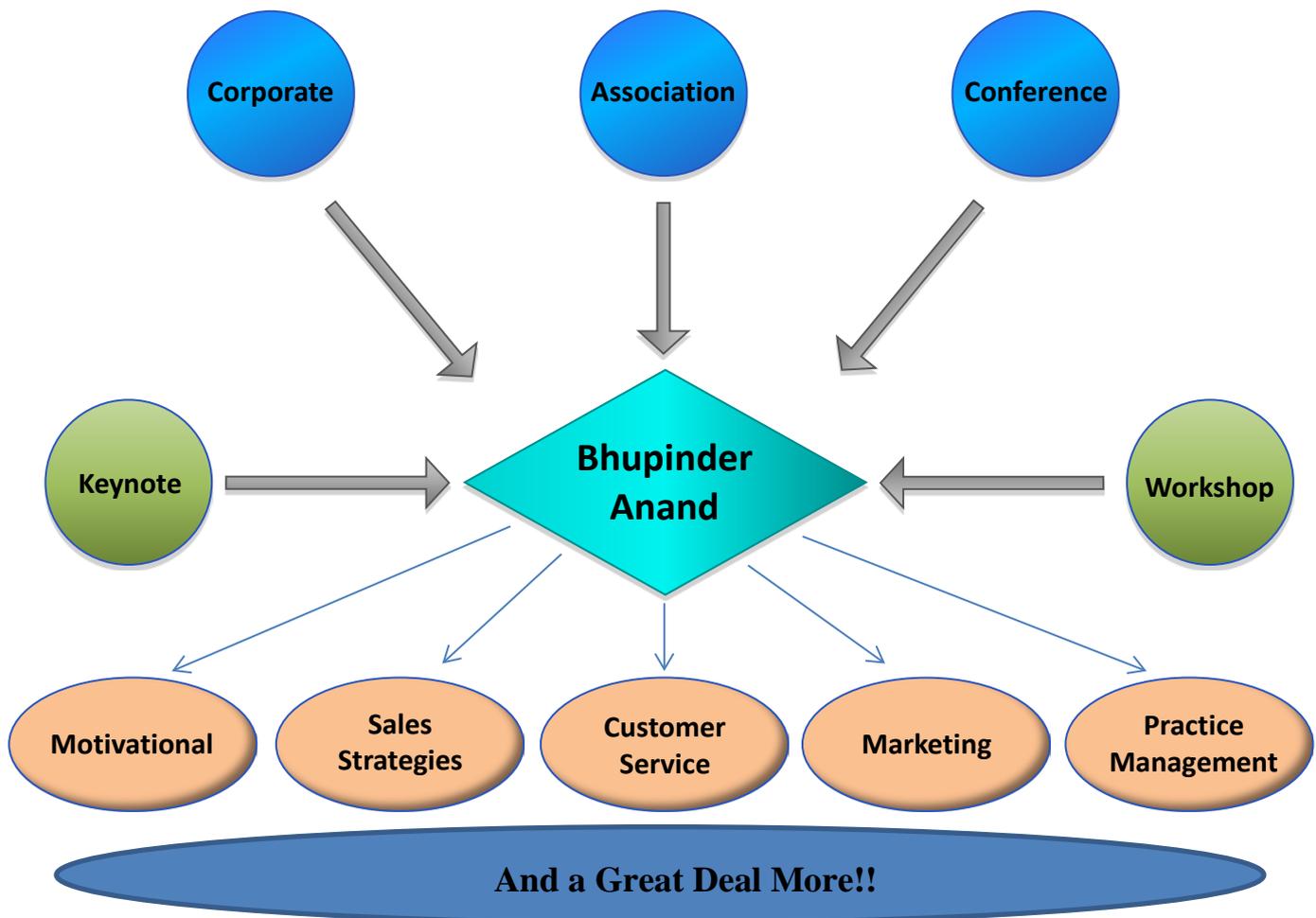
Please get in touch to discuss your requirements and Bhupinder will create a package for your specific needs.

## Expenses

In addition to any fee, certain other expenses would be required, such as:

- Business class airfare from London (using Air Canada if heading West and Singapore Airlines if heading East)
- At least 4 star hotel accommodation
- All meals provided or reimbursed
- Room to include internet connection and one international call per day
- Airport to hotel transport and return
- Home to airport taxi and return – this normally costs around £50 (approximately US\$75)
- Per diem subsistence of £25 ((approximately US\$38) per day
- Up to 90 minutes spa treatment in hotel, if available
- Other expenses (e.g. printing of materials, etc), as required and agreed

## IN SUMMARY



### The Next Step

I'd like to know more about what you are planning for your event and how I might be able to help. Through knowing more about your aims and objectives, I can tailor a package that will give your event a WOW!

Delegates will leave feeling more confident and energised with material that they can put to immediate use.

So, please contact me at: [Bhupinder@anandassociates.com](mailto:Bhupinder@anandassociates.com)

Or, call me on: +44 7949 161241

I look forward to hearing from you!

*Bhupinder*

ADVISOR MASTER CLASS

# APPENDIX ONE

## Outlines of Bhupinder's Speeches

### Preparing for Success in a Changing World

This speech is made up of two halves. The first part is an analysis of why and how to create a personal brand and explores how the use of language affects the results that we get. Creative language is not difficult to adopt and helps to set your brand apart. This part concludes with an interactive discussion about how to answer the 'what do you do' question using simple words in a creative, impactful way.

The second part of the speech can be flexible, but for a financial services audience, usually comprises practical and transferable modern life insurance sales ideas.

The session is dynamic, fun, interactive, thought provoking and highly practical with a very high level of energy in the room.

**Type of Speech:** Ideally Main Platform or Keynote but can be a Focus Session

**Ideal Audience:** Any

**Length:** 30 to 75 minutes

### How to be A Financial Architect

This speech is aimed at financial advisers who want to develop a holistic financial planning relationship with their clients.

The speech sets up the need and demand to provide this service and then explores the discussion that takes place in a financial planning conversation. There is initially an analysis of how to get clients to share their personal values and engage in the process.

Bhupinder then shares his financial planning meeting agenda and the balance of the session then explores the content of that agenda with numerous sales ideas and presentation techniques shared.

It explains the process of having two client meetings, one to explore ideas and the other to present solutions and make decisions. It shows how to get the client's commitment to proceed at the end of the first meeting.

The general attitude is that professional selling is not about selling products but facilitating the buying process.

The session is dynamic, interactive, thought provoking and highly practical with many transferable ideas and techniques.

**Type of Speech:** Focus Session but can be a Main Platform  
**Ideal Audience:** Financial Adviser  
**Length:** 60 to 90 minutes

## Creative Retirement Planning

With an increasing number of elderly population and people living longer, it is essential that everyone has a good retirement plan in place.

This speech explores what motivates clients to take the action they need to take and uses current and relevant statistics and material to aid the advisory process.

It explains that people do not want a pension or to think about retirement planning, but everyone wants to talk about creating financial independence.

With many sales ideas and tools that advisers can use immediately, delegates will see an immediate impact in the quantity and quality of their sales.

The session is thought provoking and highly practical with many transferable sales ideas and techniques.

**Type of Speech:** Ideally a Focus Session but can be a Main Platform  
**Ideal Audience:** Financial Adviser  
**Length:** 45 to 60 minutes

## Getting More and Better Quality Referrals

We all know that the best way to grow our business is by getting existing clients to introduce us to the people they know and give us an endorsement. Yet, many advisers do not ask for referrals and, when they do, they ask the wrong question.

Ideally, the referrals we get should not just increase the volume of our business but also the quality of our business. By asking the right question, we can get clients to pro-actively introduce us to their wealthiest contacts and within just a few generations of referrals, we could be talking to people earning ten times what our current client are earning.

This speech shows how to position your proposition to encourage referrals, how to ask the right questions and to actively involve the client in the introductory process.

The session is fun, interactive, thought provoking and highly practical with many transferable sales ideas and techniques.

**Type of Speech:** Ideally a Focus Session but can be a Main Platform  
**Ideal Audience:** Any  
**Length:** 45 to 60 minutes

## TOT (Top of the Table) Made Easy by Moving Upmarket

There are two ways of reaching MDRT's TOT status – seeing a lot more clients or seeing fewer clients but of higher sales value. This speech explores the latter strategy.

It first discusses *why* to move upmarket before moving on to *how* to do so. Bhupinder shares the secrets of a TOT member and shows practical examples of where to find wealthy clients and what they are looking for.

Alongside many high-end sales ideas, this speech is about raising the self-belief and confidence of an adviser that they can service this market place.

The session is fun, interactive, thought provoking and highly practical with many transferable sales ideas and techniques and highly motivational.

**Type of Speech:** Ideally a Focus Session but can be a Main Platform

**Ideal Audience:** Financial Adviser with some experience

**Length:** 60 to (ideally) 90 minutes

## How to Work a Room

Many people think that networking is about attending an event or a party and collecting as many business cards as possible, almost as if it was a competition. Very little seems to happen afterwards, as most of those people cannot remember who we are when we contact them.

More than just about how to network, this speech is a highly practical exploration of how to stand out from the crowd and gain not a high quantity of cards, but a few key contacts that are keen and motivated to meet us.

This speech is interactive with the audience on how to answer the 'what do you do' question with a memorable response that generates results.

Bhupinder also demonstrates how to find out what someone earns within 30 seconds of meeting them.

The session is fun, interactive, thought provoking and highly practical with many transferable ideas and techniques.

**Type of Speech:** Focus Session

**Ideal Audience:** Any

**Length:** 45 to 60 minutes

## Be the Person you Want to be in Ten Years' Time, Today

This speech explores how time seems to go faster the older we get and so planning for the next ten years of your life is not such an unreasonable thought. The problem is that most people don't know how to start.

The speech shares Bhupinder's five key factors for success and how putting these together results in strategic decision making, creating a vision alongside realistic goals and a plan to achieve them.

There are numerous stories and analogies that are shared from Bhupinder's own experience in this highly motivational session.

The session is fun, interactive, thought provoking, highly motivational and practical.

**Type of Speech:** Ideally a Main Platform or Keynote but can be a Focus Session

**Ideal Audience:** Any

**Length:** 60 to 90 minutes

## So What Makes you So Different?

This speech explores how little it takes to provide an extraordinary level of service.

The reality is that, as we become more regulated, more qualified and more professional, it is becoming harder to stand out from the crowd. Also, our prospects are no longer seeking 'the best' as they accept that we are all competent at what we do. What they want now is someone who is *different*.

The speech examines this further by using real life examples, stories, anecdotes and videos to illustrate the point that differentiation comes from your service proposition...and this does not have to be difficult or costly to deliver.

The session is fun, interactive, thought provoking and highly practical with many transferable ideas and techniques.

**Type of Speech:** Focus Session or Main Platform

**Ideal Audience:** Any

**Length:** 45 to 60 minutes

## Why and How to Charge Fees

Many financial advisers are giving away their knowledge and expertise in the hope that they will make a sale to earn a commission to pay for their total time.

Simultaneously, the world of financial services is moving more and more into a fee-based environment and advisers are struggling to understand how to make this transition and what to charge, when to charge and how to charge.

As a fee-based adviser for nearly 20 years, Bhupinder has the experience of having developed several models and so can share this knowledge to accelerate the process for someone wanting to make the change.

This session is very practical and will give delegates a template upon which they can design and build their own fee-based model.

The session is interactive, thought provoking and highly practical with many transferable ideas and techniques.

**Type of Speech:** Focus Session  
**Ideal Audience:** Financial Adviser  
**Length:** 45 to 90 minutes

## Smashing the Glass Ceiling

You can see your dreams and aspirations...but it's as if you view them through a transparent barrier; you know what you want, but something seems to be holding you back from realising your full potential and leaves you constantly frustrated.

This powerful and inspirational speech will help delegates to identify the barriers to their vision, inspire them with proven and practical strategies and share real-life experiences to smash through their personal glass ceilings.

This interactive and dynamic presentation uses dramatic graphics, video, sound effects and music to leave the entire audience on a massive, unforgettable high note.

*Warning: this speech must be scheduled immediately before a break, or ideally at the very end of a conference as a closing Keynote.*

The session is great fun, interactive, thought provoking and hugely inspirational.

**Type of Speech:** Main Platform keynote, ideally a closing speech  
**Ideal Audience:** Any  
**Length:** 45 to 60 minutes

## A Decade of Dreams

Some peoples' dreams are just too big to achieve, whilst most people simply don't dream big enough.

In this speech, Bhupinder will get delegates thinking in a bigger, more motivational way and then take them through a practical worksheet exercise that will leave them with a strategic plan that will help them plan the next ten years of their lives, with tactical strategies along the way.

There is an analysis of how people make decisions and what motivates them to take action. Once this tool has been used by themselves, delegates will then see how they could use this to develop long-term plans for their clients using the same tool to encourage their thought process.

This interactive and fun presentation is highly thought provoking and hugely motivational with significant and practical takeaways.

**Type of Speech:** Focus Session  
**Ideal Audience:** Any  
**Length:** 45 to 60 minutes

## Stand Out by Creating Your Own Personalised Mission Statement

Personalised

Many business people struggle to differentiate themselves from their competitors. A carefully crafted Mission Statement explains what you do and whom you do it for. It forms the driving force behind your business and a benchmark to measure prospects by.

A personal Mission Statement is not about the company you represent but about who you are and your proposition. It can be used both internally and externally in marketing and other forms of communication and for benchmarking new prospects.

In this interactive and practical session, Bhupinder will help delegates create their own, personalised and unique Mission Statement which they can implement into their practice immediately.

This session uses a step-by-step worksheet that creates a real-life and personalised takeaway for each delegate.

This interactive and fun presentation is highly thought provoking and with a significant and practical takeaway.

**Type of Speech:** Focus Session  
**Ideal Audience:** Any  
**Length:** 45 to 60 minutes

## Make 201x Your Best Year Yet!

Looking for a keynote address that will set up your sales force's new sales year?

This speech takes the delegates through a review of the previous 12 months in order to learn from both successes and failures to create a plan for the New Sale Year.

It then further breaks down the strategy into a quarterly review program that keeps them on track for success.

Using real life stories, anecdotes and analogies, this speech will leave your team motivated to achieve even greater success.

This session uses several step-by-step worksheets that create personalised takeaways for each delegate.

This interactive and fun presentation is highly thought provoking and with significant and practical takeaway material.

**Type of Speech:** Main Platform or Keynote or Focus Session  
**Ideal Audience:** Any  
**Length:** 45 to 60 minutes

## Grow your Business the Easy Way by Working with Professional Introducers

The best clients are those that are referred by others. And the best referrals are from your prospects' other professionals.

But why should they introduce their clients to you?

This speech creates an agenda for a transparent conversation that address the introducer's fears and concerns whilst also explaining the benefits and rewards.

This session uses several practical ideas that every delegate can tailor to their own needs and preferences, resulting in an instant way to increase sales in a professional and enjoyable manner.

**Type of Speech:** Focus Session  
**Ideal Audience:** Any  
**Length:** 30 to 45 minutes

## Prepare a 60 minutes Presentation in Just 10 Minutes

Whether delivering a written or verbal presentation, whether to one person or an audience of thousands, many people simply don't know how to start.

How to structure it, what to say, how to begin, how to end – so many issues to consider!

This speech takes the delegates through a series of interactive processes that shows them how they can deliver a presentation on almost any subject with a just a few minutes preparation. The presentation might be for a conversation, a speech, a report or even a telephone conversation that needs to be structured.

At the end of this fun and practical session, delegates will have prepared a sample speech using the materials and be ready to continue using the techniques immediately thereafter on a daily basis.

**Type of Speech:** Focus Session  
**Ideal Audience:** Any  
**Length:** 45 to 60 minutes

## Gain without Pain – Preparing for Success Ahead of a Regulatory Revolution

Regulatory change is sweeping across financial services globally, much of it modelled on the UK experience.

What's worked well, what has not and what's been the impact on consumers and advisors? This speech will address these points and more, with an emphasis on what agents and advisors can do to be ahead of change and competitors whilst growing income and profitability in the new world. This is an essential presentation shares first-hand experience of the practical transitions agents and advisors will need to make to sustain success.

**Type of Speech:** Main Platform, Keynote or Focus Session

**Ideal Audience:** Any

**Length:** 45 to 90 minutes

## The Power of Words

It's not what you say, it's the way that you say it.

By simply changing the usual words we may use in client relationships, we cause a different reaction, which creates a different response which leads to a different result.

The power to influence by the use of creative words and phrases is a relatively easy thing to do if enough initial thought is given.

This speech shares real-life examples of how to implement this strategy with immediate effect and causes delegates to immediately address their own patterns of conversation.

**Type of Speech:** Focus Session or Keynote

**Ideal Audience:** Any

**Length:** 45 to 60 minutes

## Advisor Master Class

Whilst immensely valuable and practical material is delivered through his Keynote or Focus Session presentations, even more value can be given through delegates spending a full day with Bhupinder.

Some years ago, having felt that he had so much more to share, Bhupinder put together a 9 hour training day where he could spend more time in going into the detail of how to be a better holistic financial planner.

In this full day program, as a fellow practitioner, Bhupinder helps delegates to create strategies that will result in a dramatic increase in their personal productivity. The contents of the day include:

- Creating a 10 year 'Decade of Dreams' to get the thought process working; this also provides a very valuable tool that can be used with clients
- Creating a brand and identity and marketing strategy
- How to make effective appointments that will always result in business
- How to run a financial planning meeting using creative questioning techniques and setting up an agenda for the rest of the meeting

- Creative sales ideas throughout
- How to position the need for a written financial plan and get paid for it
- How to set up and run the second meeting that always results in multiple sales
- Processing the case and servicing the client and growing your business

This is an intensive day and suits both new and experienced advisors who wish to provide a more holistic relationship for their clients. It is full of instantly transferable and practical material and maypast delegates have seen their productivity immediately at least double. Indeed, several delegates have attended several Master Classes as they attend again having gained knowledge from a previous session and seen the difference and find a refresher useful.

<b>Type of Speech:</b>	All day workshop
<b>Ideal Audience:</b>	Any financial adviser of team manager
<b>Length:</b>	Up to (and ideally) 9 hours
<b>Fee:</b>	Charged on a per delegate basis and depends on size of audience and other details, such as who is picking up travel, venue expenses, etc.

### Advanced Advisor Master Class

As a result of tremendous results being delivered through the Advisor Master Class, many delegates wanted more. So, Bhupinder developed the Advanced Advisor Master Class as a follow up, to impart even more material, knowledge and expertise.

The Advanced class raises the level of skills that an agent can demonstrate and is again based upon Bhupinder's own experiences as a fellow financial adviser. The material is real, not theoretical or academic, and is practical and instantly transferrable.

The Advanced class content includes:

- Moving into the Corporate Market
- Moving Upmarket
- Advanced Marketing Techniques
- Providing Extraordinary Service
- Advanced Presentation Techniques
- Advanced Sales Ideas

<b>Type of Speech:</b>	All day workshop
<b>Ideal Audience:</b>	Any financial adviser who has already attended the Advisor Master Class
<b>Length:</b>	Up to (and ideally) 9 hours
<b>Fee:</b>	Charged on a per delegate basis and depends on size of audience and other details, such as who is picking up travel, venue expenses, etc.

### Prefer Something Else?

**Bhupinder can speak on most subjects relating to sales, business strategies and motivation. Perhaps the only subject he cannot help directly with is recruitment.**

Having said that, several managers who have used Bhupinder's ideas have said that his material is transferable to any type of business requirement, which has indirectly aided them in recruitment strategies.

Get in touch and tell us what you're trying to achieve,  
and we'll give you an honest answer of how we can help or not.

## APPENDIX TWO

### Sample Videos

#### MDRT Annual Meeting, Main Platform, Vancouver, Canada



[https://www.youtube.com/watch?v=pyG6MXI-4\\_w](https://www.youtube.com/watch?v=pyG6MXI-4_w)

#### Openwork Annual Conference, Birmingham, UK



<https://www.youtube.com/watch?v=ECG9OnFnQKI>

ADVISOR MASTER CLASS

November 2016

## MDRT Annual Meeting, Main Platform, Anaheim, Los Angeles



<http://www.youtube.com/watch?v=Xx4joodGAoc>

## MDRT Day, Taipei, Taiwan



[http://www.youtube.com/watch?v=Yqh\\_4lln\\_hc](http://www.youtube.com/watch?v=Yqh_4lln_hc)

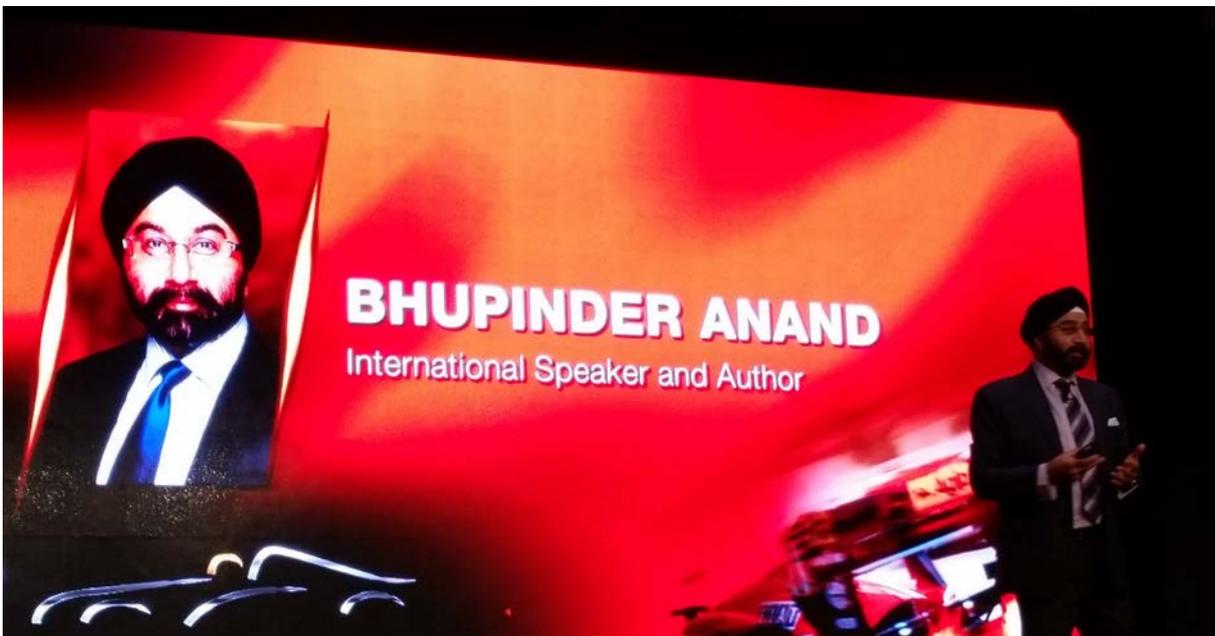
## APPENDIX THREE

### Sample Photos











Inspired delegates wanting to shake hands after 'Smashing their Glass Ceilings!'

## “With my favourite speaker at the IFPAS Congress, Singapore”



Bhupinder Anand, one of the top financial practitioner in UK, reminded us that we are like financial artists. We start with a piece of paper and create value. Over decades, the value grows. Amazing!

Posted by [Lee Meng, AFC, FChFP, B.Business \(Banking and Finance\)](#) at [Friday, April 16, 2010](#) ✍️





# APPENDIX FOUR

## Smashing the Glass Ceiling Book

### What is a Glass Ceiling?

You can see your dreams and aspirations...but it's as if you view them through a transparent barrier; you know what you want, but something seems to be holding you back from realising your full potential and leaves you constantly frustrated.

In his first book, Award Winning Financial Advisor and highly sought after Global Motivational Speaker, Bhupinder Anand, will help you:

- Identify the barriers to your vision
- Inspire you with proven & practical strategies and experiences
- Smash through your Personal Glass Ceilings

Bhupinder Anand is Managing Director of 'Anand Associates Ltd', a firm of Independent Financial Advisors based in Central London, UK.

He has twice been awarded the UK's 'IFA of the Year', and his business has been rated as Evening Standard's 'Best IFA in the Capital'.

Anand is a Top of the Table Life member of the Million Dollar Round Table (MDRT), a global organisation representing the world's top 40,000 financial advisors.

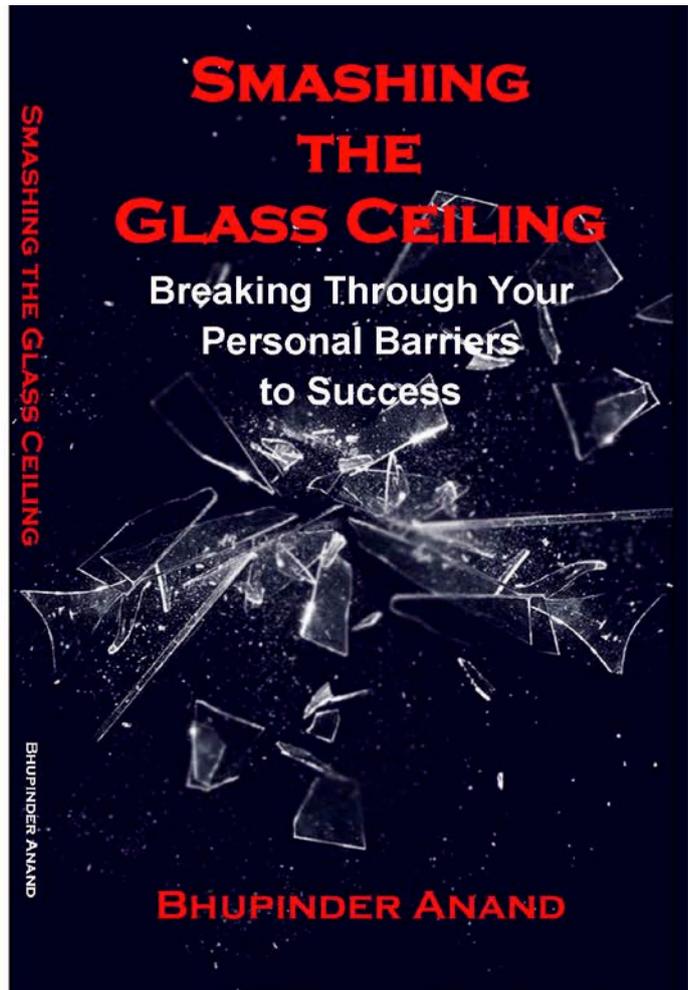
Anand is one of the most popular financial services speakers in the world and regularly speaks at many MDRT Meetings and numerous other major conferences, inspiring many thousands of agents and advisors to greater success. He is sought after by all types of companies from around the world as a keynote speaker.

Anand also leads the 'Advisor Master Class' training programme, assisting financial advisors to be more successful, using his tried and tested, practical 21<sup>st</sup> Century techniques.

**This book is aimed at a broad audience: it is essential reading for anyone who wants to exploit their own unrealised potential and be inspired to reach new heights of success in whatever they do!**

£20 (UK) / \$25 (US)

© Advisor Master Class



This (182 of pages) book can be printed with your company logo / event on the front page and with a page for a corporate message.

This is ideal as a conference memento or reward.

Contact us to discuss details and pricing.

# NOTES

# **ADVISOR MASTER CLASS**

**10, Glentworth Street  
London  
NW1 5PG  
UK**

Tel: 44 207 486 5486

Fax: 44 207 486 5487

Email: [bhupinder@anandassociates.com](mailto:bhupinder@anandassociates.com)

or [enquiries@advisormasterclass.com](mailto:enquiries@advisormasterclass.com)

Web: [www.advisormasterclass.com](http://www.advisormasterclass.com)