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Press Release

For Immediate Release
Date: December 15, 2009
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Loring Ward Partners with CEG Worldwide to Offer Wealth Management Program for Financial Advisors

San Jose, CA – Loring Ward announced a partnership with CEG Worldwide—a recognized leader in coaching and consulting services for top tier financial advisors—to create a comprehensive practice development and coaching program focused on wealth management.

This program provides independent financial advisors with tools and strategies to address one of their greatest challenges today, helping clients successfully navigate complex wealth management issues such as college planning, tax mitigation, retirement planning and estate planning.

According to John Bowen, Chief Executive Officer of CEG Worldwide: "Our research suggests that wealth management is the future of advice. Wealth Managers manage twice the assets of Investment Generalists, and they have a much deeper understanding of their client's concerns, goals, and dreams."

Available to financial advisors who partner with Loring Ward, the program consists of a series of 1- and 2-day educational sessions held around the country as well as an intensive coaching program.

"CEG Worldwide has a long track record working with leading financial advisors to magnify their success," said Alex Potts, Chief Executive Officer of Loring Ward. "Their expertise will advance our goal of empowering advisors to achieve new heights of productivity, focus, and client satisfaction."

In addition to coaching and practice management, CEG Worldwide will also work with Loring Ward on developing a special wealth management book for investors, slated for release in late 2010.

"The best way for Loring Ward to succeed is to help advisors who work with us establish even more successful client relationships" said Steve Atkinson, Senior Vice President of Loring Ward and Director of Business Development. "This is an enormous leap forward in providing advisors with the tools and training to restructure their businesses and spend more time with clients on the financial issues that matter most."

About Loring Ward
Loring Ward (LWI Financial Inc.) is headquartered in San Jose, CA and provides a turnkey asset management program to more than 750 of America's most knowledgeable and successful investment advisors and their clients. These services include investment strategies and products, back office operational processing, education and training, and business development support. As of 12/09, it has more than $4.9 billion in assets under management. For more information, please visit www.loringward.com.
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