Special Guest Speaker!

Dave Savage, Founder and CEO of Mortgage Coach will be putting on a special sneak-preview presentation May 24th. You will have a hand in the formation of the new Mortgage Coach. Dave will discuss the future of Mortgage Coach, some Best Practices, and he will open the discussion up for a Q & A session. Mortgage Coach subscribers will receive $500 off the normal site visit investment. This event will begin at noon on May 24, 2006.

Debt & Equity Management Site Visit

Build your practice to a new level!

"Chuck Oliver has implemented equity wealth building concepts and strategies into a unique debt and equity advisory practice. He exemplifies what a true financial management specialist should aspire to become. Chuck really helps his asset advisor partners and their clients learn and grow to a higher level of financial prosperity."

- *Douglas Andrew, Author, Missed Fortune & Missed Fortune 101*

"Chuck Oliver is one of the great equity management leaders in the mortgage industry. His mortgage planning concepts are cutting-edge and produce immediate results. For less money than 1 loan fee, you will receive the tools and systems to exponentially grow your business. I have personally made the investment to send my entire mortgage planning team to Chuck's Site Visit."

– *Steven Marshall, CEO of Strategic Equity & $1 Billion Life-Time Mortgage Originator*

"Attending Chuck's Asset Advisor Site Visit gave me the tools and ideas I need to implement my ideas into my own business. Seeing first hand how Chuck builds his relationships was invaluable. I can't wait to implement the ideas into my business!"

– *C. Patrick O'Brien, Tower Funding, Valencia, CA*

American Equity Home Loans Offices:

- 2355 Derr Road, Springfield, OH 45503; 937-323-9194 (Headquarters)
- 3898 Tamiami Trail N, Naples, FL 34103; 239-304-1747
- 11299 Stonecreek Drive NE, Suite F, Pickerington, OH 43147
- Toll Free Phone: 800-825-1766, Toll Free Fax: 866-418-9519

Debt & Equity Management Site Visit

Build your practice to a new level!

We built our practice with a focus on Asset Advisors in 1995. It has taken many years to get it right but now we have created the experience that has Asset Advisors seeking us out - and for more than CE credits. We have a waiting list and we are in a position to choose which Advisors we want to grow with that have long term vision and share our same values. Our best failed experiences alone are worth your investment. This will allow you to not have to reinvent the wheel and experience quicker success.

We want to give back to the industry the ins and outs of how to attract Asset Advisor relationships, how to build the flow, the team, the seminar, and the asset advisor equity management site visit. We have designed an entire planned experience that enables the new and veterans to the business build Debt and Equity Management into their practice. This experience helps the inexperienced Mortgage Planner to the most experienced Mortgage Planner who wants to have a competitive advantage in their market place.

We will show you the ins and outs of how we have crafted our practice into a Debt, Equity, and Purchase Advisory Planning Team that supports the growth of our Strategic Asset Advisor Partners and our clients. We share the seminar, the site visit to see and learn the platform from which we teach and instruct, the planner site visit, and the unique practice team we have built with all the roles and functions that each play in order to keep growing. We share our practice layout, tour of our one stop financial center, and team interviews so we can share the entire opportunity with practical implementation action plans to enable you to get started right away.

We focus on the Asset Advisor who truly wants to improve the lives of their clients. We have created a unique experience and platform for Asset Advisors to come learn how to apply proper debt and equity management solutions for their clients. We have created an easy to learn from seminar which allows clients to experience the impact debt and equity management can have on a client's financial success. We also strive to help build the Asset Advisor's practice with our proactive rate, equity, and program alert management plans.

What we provide for your investment:

- Our Debt and Equity Management Seminar with Asset Advisor partners and their clients live.
- Our Turn Key Asset Advisor Site Visit. We teach the asset advisors and their assistants how easy it is to work with our team, tour our practice and the Financial Center, explore our Asset Advisor practice builder programs, introduce our unique Debt and Equity Planning Team and have a few share their roles in the practice, and review our getting started program.
- We will meet with the entire Debt and Equity Seminar and Site Visit group and reflect on in depth questions and answers. We will make sure you are ready to have clear action plans to implement upon your return home so you can experience the benefits of building a Debt and Equity Management Practice.

- Investment for our turnkey program is $2,995.00, or a $4,500 total investment to bring your key support person or your financial advisor with you (limit one additional person). A 50% deposit is required to secure your reservation. The remaining balance is due one week prior to the site visit. Please make checks payable to American Equity Home Loans.

What you walk away with:

- Video of the workshop seminars you attend
- Full marketing plan with legal disclosures
- Team interviews
- Team roster with job functions and job titles
- PowerPoint presentations
- We open our entire practice to you to swipe and adapt for your practice.

We limit to 4 Mortgage Planners and planner/support to keep to a total maximum of 8, so we can make a more intimate experience and give you the time and attention focus you deserve for your investment. Enrollments are filling quickly, please email Kristen at kristenmccarty@thechuckoliverteam.com to reserve your seat. If you heard about our seminar while at TEAM2, please mention this when you enroll!

Looking forward to playing a servant role in your success!

Charles D. Oliver
CEO & President
American Equity Home Loans
Debt, Equity, and Purchase Advisors

"As a Mortgage Advisor devoted to excellence in Debt and Equity Advisement I can personally attest to the fact that Chuck Oliver is in the top one tenth of 1% of the industry in regard to knowledge, advice and execution. He is a force of nature that all Mortgage Industry experts should tap into if they want to grow their practices to the next level." - *John Bell, Citizens Trust Mortgage Corp, #54 Mortgage Originator Magazine top 200 for 2004*

Debt & Equity Management Site Visit Agenda

Wednesday, May 24:

5:00pm: Dinner and strategy planning session

Thursday, May 25:

8:30am: Leave for site visit at Headquarters office in Springfield
9:45am – 10:00am: Tour of Springfield office and meet the Team
10:00am – 10:30am: Brunch catered in the office
10:30am – 1:30pm: Presentation
1:30pm – 2:00pm: Question & Answer time
2:00pm – 3:00pm: Time to check voicemail, email, etc.
3:00pm: Leave for Columbus for dinner and seminar
4:00pm: Dinner
6:30pm – 9:30pm: Debt & Equity Management Seminar
9:30pm: Leave seminar center for drop off at Hilton

Please note: You are responsible for providing your own transportation to and from the airport.

Please have your key support person follow-up and R.S.V.P. by May 9th to Kristen McCarty at kristenmccarty@thechuckoliverteam.com or 800-825-1766 x117. Please also contact Kristen for additional site visit dates.

Recommended Accommodations

Courtyard Columbus Easton
3900 Morse Crossing
Columbus, OH 43219
1-614-416-8000

Only a 10 minute ride from the Columbus International Airport.

Please note: Chuck will be staying at the Courtyard during this time. He will be providing transportation to and from the Courtyard only. If you choice to stay in another hotel, you must make your own transportation arrangements. You are also responsible for making your own hotel reservations.

To: Chuck Oliver
From: J.C. Spearry
Subject: Thank You…

Chuck, I hardly know where to begin. I'm sure if you stop for a moment of reflection you could remember the moment of your own epiphany. Let me tell you something: mine is overwhelming. There has been so much information to process over the past week or so that it has taken a while for me to find a way to express my gratitude appropriately. Maybe just a simple "Thank You" is in order, but for some reason it just doesn't seem like enough.

Special thanks are in order for a number of reasons: ***The Site Visit***…as simple as it appears, it oozes with effectiveness. It's so obvious why you have attained such success. ***The Gifts of Partnership***…a copy of 101, the copy of Time Traps (excellent!). A million thanks for both of those! ***The information that is guiding me to "connect the dots"***…Mortgage Coach, the seminar format, and the MMG introduction…what an added value to any practice. ***The opportunity to work with you***.

Redefining my practice has been a breeze and clients are much more receptive to the "Debt, Equity, and Purchase Advisor" approach than the old "Hey, I'm a mortgage broker!" approach. It was great timing to recognize this approach because I didn't have much to "fix." And Financial Advisors are flocking to the phone to ask how they can help…no kidding. I just strategically planted a couple of seeds and here they came.

J.C. Spearry
Executive Loan Consultant