

ETHICS TESTIMONIALS 7.23.2020

1. GREAT job with this Ethics Workshop!!! It was BY FAR the best ethics course I've ever attended!!! Your use of interactive technologies made your ONLINE workshop more engaging and more enjoyable than even the best IN PERSON conference session I've attended! I'm also teaching "Life Insurance Advice under New CFP Practice Standards" for CFP CE credit and am going to TRY to incorporate some of your techniques and technologies (although I am NOT the natural presenter that you are). Feel free to use this here or have anyone call me for a reference.

Barry

Barry D. Flagg, CFP®, CLU, ChFC, GFS®
President, Founder & Inventor

Veralytic

Research. Ratings. Results.

888.908.8242 📞

800.409.3222 📠

2. Honestly, I always dread these ethics courses. I have to say, though, that Melissa's excellent preparation, organization of the material, professional delivery, and thorough knowledge of the topic made it quite educational and enjoyable. I will be looking forward to any other future courses she may be offering (particularly a COI course she mentioned).

-Julio Lopez Brito

3. It was enjoyable. It certainly is less expensive and different, but a well-presented course. The focus was appropriate in that it should get us CFPs to keep digging deeper into the Road Map and the depth of the updated Code & the Standards.

Howard Kramer, CFP®, AIF®

President

(954) 424-2487 Office

(954) 288-5670 Mobile

www.hakapa.com

[*941 SW 88th Terrace*](#)
[*Plantation, FL 33324*](#)

4. One of the best ethics course presentations I've been to! And I have been a certified financial planner since 1992!

Melissa did an awesome job and really made it smooth and easy to understand.

Wyrostek Financial Group, LLC
James A. Wyrostek CFP®, ChFC, CLU, AEP
Managing Principal
CERTIFIED FINANCIAL PLANNER™ Professional
wyrostekfinancialgroup.com
jimwyrostek@gmail.com
260-437-4713