

PRESS RELEASE - August 8, 2008

BAI is pleased to announce the release of **Leadership Series™ 1**: a new resource that has been created to advance the development of financial services businesses to a world-class level. Leadership Series™ 1 focuses on the business issues confronting leaders to whom one or more advisors report. It is comprised of the previously released Mastery Series™ 1 (Modules 1, 2 and 3) and the newly developed Module 7.

Module 7 contains an overview of a tool called the Success Road Map® that is designed to help leaders establish an accountability culture within their businesses that is consistent with the core principles of Values-Based Financial Planning™. This Module explains how to create a Success Road Map® for every member of your team, with scripts as well as audio and video demonstrations along the way. It also describes how to develop Action Plans for each member of your team to help them to achieve their goals for the reasons that are important to them. Experience shows that firms that focus on their team members' goals significantly outperform firms that focus only on business goals and that, ultimately, team member satisfaction is considerably higher as well.

Leadership Series™ 1 combines Module 7 with the contents of the industry-leading **Mastery Series™ 1** to provide a body of work that helps leaders create an optimal work environment for their advisors and support personnel to better serve their clients. Leadership differs from management in a critical way: leaders focus upon helping their team members achieve their personal goals for the reasons that are important to them, while managers focus on getting team members to achieve the manager's (or firm's) goals without any tie to their team members' values or goals. When combined with advisors who implement the principles of Values-Based Financial Planning™¹, leadership-based firms routinely outperform management-based firms by a wide margin.

Rebecca Everett, Vice President of Training and Development for BAI, said, "Leadership Series™ 1 is the first step toward evolving typical management structures into true, leadership environments within the financial services industry. The performance gain and enhanced level of employee satisfaction offered by this paradigm shift is compelling. We are pleased to be able to advance the financial services industry in a way that builds its overall professionalism."

Leadership Series™ 1 may be acquired for a \$1,000 investment. First shipments are scheduled for September 15th, 2008. For additional information or to acquire Leadership Series™ 1, please call (800) 347-3707.

Bachrach & Associates, Inc. (BAI) is the leading professional development firm in the Financial Services industry with over 20 years of experience in creating and delivering world-class Programs, Resources and Services to fulfill its core Vision, Mission and Values. Its Vision is to transform the Financial Services industry into a true profession, and its Mission is to guide and empower Financial Professionals to create practices, built upon an earned foundation of unconditional trust, which help Clients achieve their goals and inspire them to explore and enjoy an improved quality of life. BAI is headquartered in San Diego, California, and it is proud to be an Institutional Member of the Financial Planning Association (FPA).

Leadership Series™ 1, Mastery Series™ 1, Success Road Map®, and Values-Based Financial Planning™ are the trademarks and registered mark of Bachrach & Associates, Inc. All rights reserved.

¹ Advisors and leaders trained in Values-Based Financial Planning™ utilize the content of Mastery Series™ 1 and 2. Individuals who already are in possession of Mastery Series™ 1 will be offered full credit for their prior investment.