

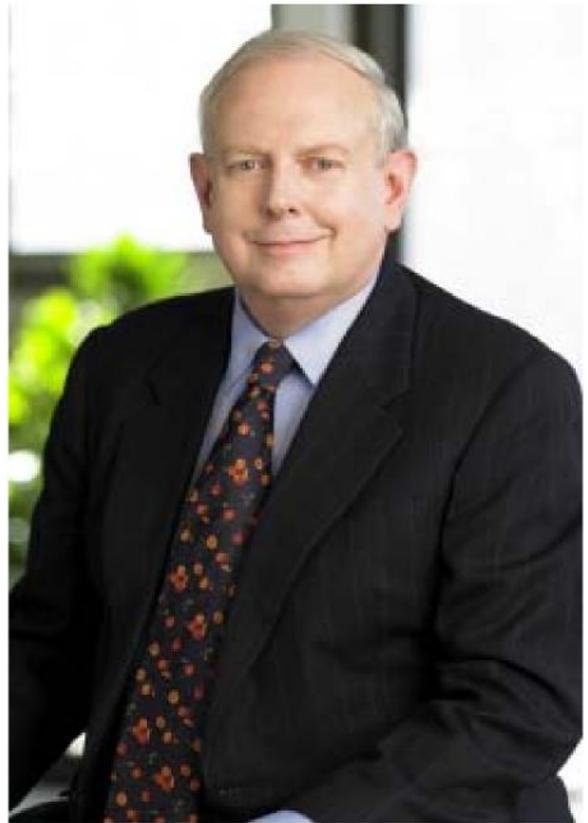
Jonathan D. Pond

Personal Financial Planning

Investing

Money Tips

Retirement Planning



SPEAKING and WEB SEMINARS

SPEECH AND SEMINAR TOPICS

For General Groups:

Money \$marts - Preparing for a More Secure Financial Future Amidst a Changed Economy

Lessons from the Great Recession

Making the Most of Your Money

Safe Money in Tough Times

For Professional Groups:

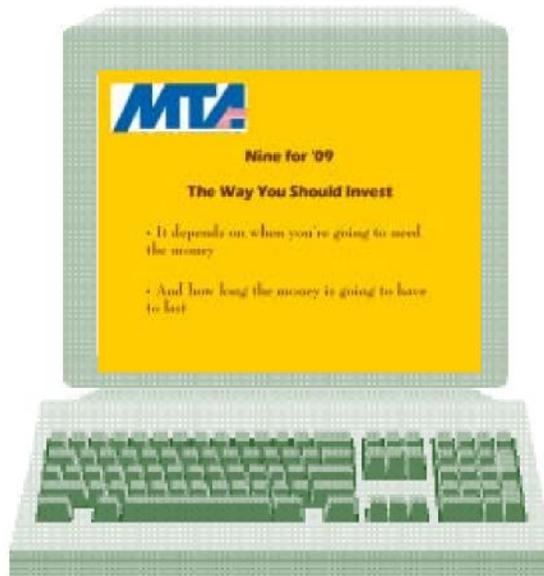
Hot Buttons - How to Better Serve Your Clients and Attract New Prospects by Addressing Their Money Concerns

What's Going on in the Economy and the Investment Markets?

*Examples of Past Jonathan Pond Speaking Projects
on Behalf of Financial Institutions*

- Speaking tours in key cities, typically involving presentations to affluent investors and prospects (“millionaire luncheons”), a broader audience, local financial professionals, and local staff.
- Radio, television, and satellite tours
- Panel moderator, featuring key investment or administrative personnel
- Continuing education and personal financial planning seminars for staff
- Speaking at conventions and professional meetings.
- Presentations to financial professionals
- Facilitating joint events with local public television stations and/or local professional associations

WEB SEMINARS



Web seminars are an efficient and effective way to educate or convey your message to geographically dispersed audiences. They can be used “off-the-shelf” or customized to meet the objectives of your organization or event planners. Jonathan Pond offers individual Web seminars and seminar series for:

- ◆ Employees
- ◆ Customers and clients
- ◆ Prospects and the general public

Depending on your requirements, Web seminars can be offered in a live, interactive format or in an on-demand format. The live, interactive format allows the opportunity for participants to ask questions and receive answers in real-time. The on-demand format is archived and is available when the individual is ready to participate. PowerPoint graphics and Participant Notes can be developed for each Web seminar as take away materials.

Organizational Benefits. Hosted by Jonathan Pond alone or with company personnel, Web seminars can be used to further an organization’s educational and promotional activities for current investors or clients, prospective investors or clients, and staff members in order to increase business, expand the customer base, and foster customer and staff loyalty.

Current investors or clients

- Becoming a trusted source for unbiased financial education
- Informing customers of available products and services
- Providing learning opportunities as a benefit of being a customer
- Developing loyalty within the customer population
- Informing customers of market conditions and trends
- Delivering workshops to increase the level of customers' financial knowledge
- Providing investment and personal financial planning education for customers and their families

Prospects and the general public

- Cultivating new customers
- Encouraging regular visits to the organization's web sites
- Establishing the organization as a trusted source for unbiased financial education
- Providing effective and understandable explanations of products and services.
- Explaining the benefits of becoming an investor or client
- Informing potential customers of market conditions and trends

Staff

- Standardizing internal information, maximizing use of fringe benefits, and enhancing level of financial and product knowledge
- Periodically updating staff members regarding company and product developments or other need-to-know information and education.
- Meeting certification and continuing education requirements for financial professionals.
- Developing loyalty within the workforce by offering educational seminars for staff members as well as their spouses or partners.
- Clarifying and making effective use of employee benefits

Examples of Web seminar programs

- Series of ninety-minute seminars on a variety of financial planning topics for staff members of a mid-sized company with offices throughout the country.
 - One hour live Web seminar offered multiple times to the general public by a large financial services company.
 - Multi-part prerecorded series with each installment focusing on a specific investing or financial planning topic archived on a company web site to drive visitors to its site.
 - A ninety-minute basic financial planning seminar/workshop with a unique pre-seminar survey completed by each participant. Each participant receives a comprehensive personalized financial review report based on his or her individual questionnaire responses. The report is the outline of the seminar
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*PARTIAL LIST OF CORPORATIONS AND ORGANIZATIONS
ADDRESSED BY JONATHAN POND*

- AARP
 - AT&T
 - Air and Waste Management Association
 - American Association of Individual Investors
 - American Association of School Personnel Administrators
 - American Institute of CPAs
 - American Society of Association Executives
 - Amylin Pharmaceuticals
 - Bank of America
 - *Boston Globe* Money Conference
 - Boston Symphony Orchestra
 - Chautauqua Institution
 - *Cincinnati Inquirer* Money Conference
 - Citigroup
 - College for Financial Planning
 - Consumer Bankers Association
 - Credit Union National Association
 - Department of Defense
 - Deutsche Bank Group
 - Emory University
 - Farm Bureau Financial Services Co.
 - Fidelity Investments
 - Franklin Templeton
 - GTE
 - General Electric
 - Government Finance Officers Association
 - Harris Trust
 - Harvard University
 - Hewlett Packard
 - IBM
 - Institute of Management Accountants
 - International Association for Financial Planning
 - Investment Company Institute
 - JCC of Greater Washington
 - JP Morgan Chase
 - John Hancock
 - Jumpstart Coalition
 - Kodak
 - Learning Annex
 - National Association of Federal Credit Unions
 - National Credit Union Management Association
 - National Football League
 - National Foundation for Women Legislators
 - National School Boards Association
 - National Society of Fundraising Executives
 - nd Street Y
 - Northeastern University
 - Northern Trust Company
 - Norwest Bank
 - PNC Bank
 - Pioneer Mutual Funds
 - Promotional Products Association
 - Public Broadcasting Management Association
 - Red Bull North America
 - Research Institute of America
 - T. Rowe Price
 - *Sacramento Bee* Money Conference
 - State Farm Insurance
 - Texas Tech
 - Unisys
 - University of California San Diego
 - Wells Fargo
 - West Virginia University
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BIOGRAPHY

JONATHAN D. POND
“America’s Financial Planner”



Jonathan Pond’s work in educating the public on financial matters has been far-reaching and widely recognized. His 19 prime time public television specials have been critically acclaimed for their effectiveness in providing useful and understandable financial guidance to people of all financial circumstances. He is a frequent guest on network and cable television news programs as well as radio programs throughout the country and has received numerous awards for his media work.

Jonathan is widely sought as an objective and entertaining observer of the investing and personal financial planning scenes. He has addressed general audiences and financial services professionals in 48 states and numerous countries. Event organizers are particularly attracted to his ability to customize a presentation to meet their needs and the interests of the audience. He also develops and hosts customized web seminars that are used by organizations for their staff, customers, or prospects.

Jonathan was educated at the University of North Carolina, Emory University, and the Harvard Business School and started his career as a CPA in the New York, Atlanta, and Bermuda offices of the international accounting firm of KPMG. Although he often says the key to financial success is never taking financial responsibility for anything that eats, Jonathan doesn’t always practice what he preaches. He resides in a Boston suburb with his wife, three daughters, and a menagerie of slothful pets.



AWARDS AND RECOGNITIONS

General

- The Malcolm Forbes Public Awareness Award for Excellence in Advancing Financial Understanding
- Financial Ambassador of AARP
- Distinguished visiting professor at Texas Tech University and the University of Alabama

Television

- An Emmy® for his contributions to a television series on financial planning in the 21st century
- His television specials and series have been recognized in film competitions with a platinum, gold, two silver, and two bronze medals

EXCERPTS OF TESTIMONIALS

HARVARD MEDICAL SCHOOL

“We received an overwhelmingly positive response from our many attendees. The audience thought your knowledge of the subject matter and lecture were excellent. As an outstanding speaker, and as a recognized name in financial planning, your wisdom and suggestions were immensely useful to our faculty.”

BUCKMAN, BUCKMAN & REID, INC.

“You created electricity that permeated the room. You were on fire! I have never seen a situation where the speaker announces that the meeting is over and no one gets up. “

JUMP START

(Your inspiring keynote address) “moved the teachers beyond thinking about personal financial literacy to how can I include this area in my curricula. This was the ultimate goal of the conference and we are grateful that you were a major reason why the teachers are moving into action ”.

“Jonathan Pond was a dynamic speaker and provided a great amount of information which can be used in my professional life and personal life.”

“Jonathan Pond’s talk was delightful as well as helpful.”

“The keynote speaker was awesome.”

“Jonathan Pond was fantastic! Very engaging. wonderful speaker!”

“Great information presented in an interesting and entertaining forum.”

“Excellent speaker - have seen him on PBS - he’s great!”

RED BULL NORTH AMERICA, INC.

“You were perfect!! Very informative all the while entertaining, that is exactly what we were looking for and you pulled off beautifully. “

SUNGUARD INVESTMENT SYSTEMS, INC.

“Your words of wisdom will help the participants make sound choices when reinvesting their money.”

T. ROWE PRICE ASSOCIATES, INC.

“Your informative and highly entertaining “Top 20 Tips” were the hit of the show. While your reputation precedes you, I would be pleased to serve as an enthusiastic reference in the unlikely event that such a need is required.”

NORTHEASTERN UNIVERSITY

“...your presentation on Financial Opportunities in a Resurging Economy attracted so many alumni that we could not accommodate all of them. “

EMORYUNIVERSITY

“Having attended many gatherings of alumni of the several schools of the University down through the years, I was hardly prepared for the exciting evening which you provided us last Thursday. Your speech, or address, was just right for that audience. You surely know how to communicate with your listeners. You held the attention of that crowd to the very end.”

NATIONAL SOCIETY OF FUND RAISING EXECUTIVES

“Within your short allotment of time, you managed to capture the essence of the joy of philanthropy...”

JEWISH COMMUNITY CENTER

“Your presentation was received with great enthusuasm. The comments were overwhelmingly positive.”

MASSACHUSETTS MUNICIPAL AUDITORS’ & ACCOUNTANTS’ ASSOCIATION, INC.

Instructor Evaluation Summary Comments:

- 1 Best - Extremely well sppoken. Good examples.*
 - 2 Just wonderful; Good information; Very inform ative; Worthwhile.*
 - 3 Great!*
 - 4 Best - Very good speaker; Interesting; Worthwhile information.*
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