

Bill Bachrach, CSP, CPAE

Values-Based Financial Planning™

Biography:

Bill Bachrach is one of the most recognized "names" in the Financial Services industry and was named "one of the four most influential people in the Financial Services industry" by *Financial Planning Magazine*. As the "father" of the Values-Based Financial Planning™ philosophy and the Trusted Advisor concept, Bill's work has had a profound impact on how Financial Professionals conduct business, and he has stood at the forefront of the movement to transform the Financial Services industry into a true profession.

Mr. Bachrach is the author of four of the industry's most definitive works, including *Values-Based Financial Planning* and *High-Trust Leadership* (co-authored with Norman Levine), and he has delivered well over 1,000 presentations worldwide including presentations for:

- Financial Planning Association's Success Forum (eight times)
- Million Dollar Round Table (five times)
- Top of the Table (three times)
- Court of the Table
- NAIFA
- CAIFA, and
- Virtually every major firm within the Financial Services industry

Bill is a member of the Speakers' Round Table; an organization comprised of 20 of the most celebrated speakers in the world.

Bachrach's articles have appeared in numerous publications, including *Financial Advisor Magazine*, *Registered Rep*, *Investment Advisor*, *Advisor Today*, *Life Insurance Selling*, *Financial Planning Magazine*, *National Underwriter*, *Agent Sales Journal*, *On Wall Street*, *Blue Chip Magazine*, *Research Magazine*, *Financial Services Journal*, *Horseshmouth.com*, *Executive Excellence*, *Personal Excellence*, in addition to many company and association publications.

On a *personal* note, Bill Bachrach successfully completed the Hawaii Ironman Triathlon in 1998. The 2.4 mile swim, 112 mile bike, and 26.2 mile marathon run held annually under difficult conditions is considered to be the toughest single-day athletic event in the world. He uses this and other unique life experiences to captivate the audiences at his speaking engagements.