



The North Atlanta Chapter
cordially invites you and your guests to

ANNUAL BUSINESS APPRECIATION NIGHT

with **Dr. Gene Henssler, Ph.D.**

President and Chief Investment Officer,
Henssler Financial Group

-and-

Mr. William G. Lako, Jr., CFP, Principal

Thursday, February 21, 2008

DOUBLETREE HOTEL, ATLANTA NW—MARIETTA
2055 South Park Place
Atlanta, GA 30339
(off Windy Hill Road)

5:30 Registration & Reception
6:30 Dr. Gene Henssler
7:15 Dinner
7:45 Mr. William Lako



Current market information

- Economic, political and U.S. demographics - outlook
- How does this relate to your clients?
 - Corporations
 - Small businesses
 - Individuals

How does this relate to you as a service provider and what are opportunities

- Excel at core competence
- Educate - you and client
- Leverage - technology, expertise, time
- Market additional services to existing clients
- Develop strategic relationships to create leverage



Tax and Accounting vs. Financial planning/Asset Management business models

- Barriers to entry
- Issues to consider
- Strategies to consider
 - Go it alone - planning and asset management
 - Hybrid - conduct planning with sub-advisor
 - Affiliate with strategic partner - refer planning and collect revenue share
 - Integrate with strategic partner - refer planning, collect revenue share, leverage technology/expertise/back office/marketing

Gene W. Henssler, Ph.D. is the President and Chief Investment Officer of G.W. Henssler & Associates, Ltd. Dr. Henssler is responsible for the overall direction of the 20-year-old company that offers financial advice and portfolio management to individual, corporate and institutional clients. Dr. Henssler began his career as a Assistant Professor of Finance at Georgia State University. After posts at the University of Toledo and Grand Valley State University in his native Michigan, he came to Kennesaw State University in 1986, and is currently a Professor Emeritus of Finance. He founded G.W. Henssler & Associates, Ltd. in 1987. A former columnist for the Atlanta Business Chronicle, Dr. Henssler has written numerous articles for newspapers, magazines and professional journals dealing with a wide variety of financial topics. In addition, Gene is a frequent guest on the Georgia Business Report broadcast on Georgia Public Television. He appears as a featured guest on all of the major network affiliate TV stations in Atlanta, as well as nationally on CNBC, Bloomberg Television and Fox News. In 1993, G.W. Henssler & Associates, Ltd. began to offer portfolio management to its clients. In 1998, Dr. Henssler started Henssler Asset Management, LLC to serve as the investment advisor for The Henssler Equity Fund (HEQFX). The Fund's investment style is substantially similar to the investment style utilized for the individual clients of G.W. Henssler & Associates, Ltd. G.W. Henssler & Associates, Ltd. currently has more than 50 employees. Dr. Henssler received his Bachelor of Science in Business Administration from Wayne State University in Detroit, and subsequently earned both his Master of Business Administration and Ph.D. in Finance from the University of Michigan.

William G. Lako Jr., CFP® is Managing Director and a Principal of G.W. Henssler & Associates, Ltd. In addition, Mr. Lako serves as Vice President of The Henssler Funds, Inc., which runs The Henssler Equity Fund. He holds the Series 7, Series 63, Series 65 Series 26 and Series 28 registrations. Mr. Lako received his Bachelor of Business Administration, major in Finance, from Kennesaw State University. He has obtained his CFP® certification.

Cost is \$25 per person. Reservations should be made no later than February 18, 2008. Please make your reservations by email at nacgscpa@yahoo.com. Please include your name, member number and the names of your guests.