



Chris Goethe
Trove, Inc.



Rick Forbus, PhD
Trove, Inc.

BLUE
VAULT™

Coaching Series

7 Ways to Build your Client Base – the Right Way

Blue Vault

Our goal is to provide the most in-depth and thorough research available on alternative investments, including nontraded REITs, BDCs, and Closed-End Funds, Interval Funds and Private Offerings to help educate financial advisors and help protect investors.

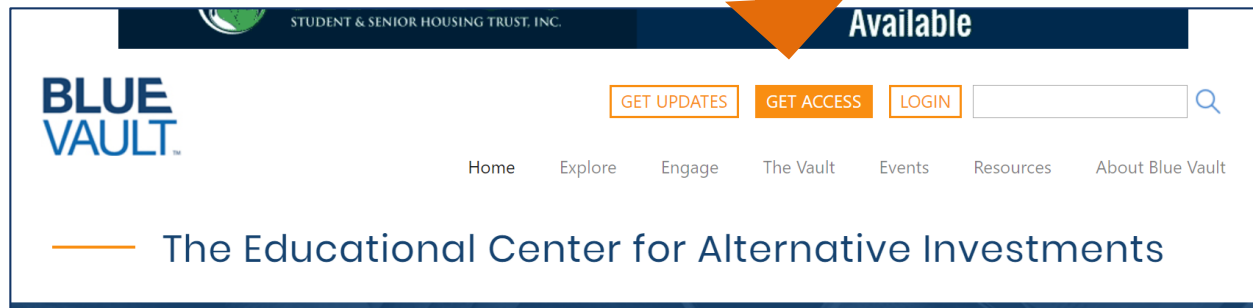
To learn more, please visit the Blue Vault website:

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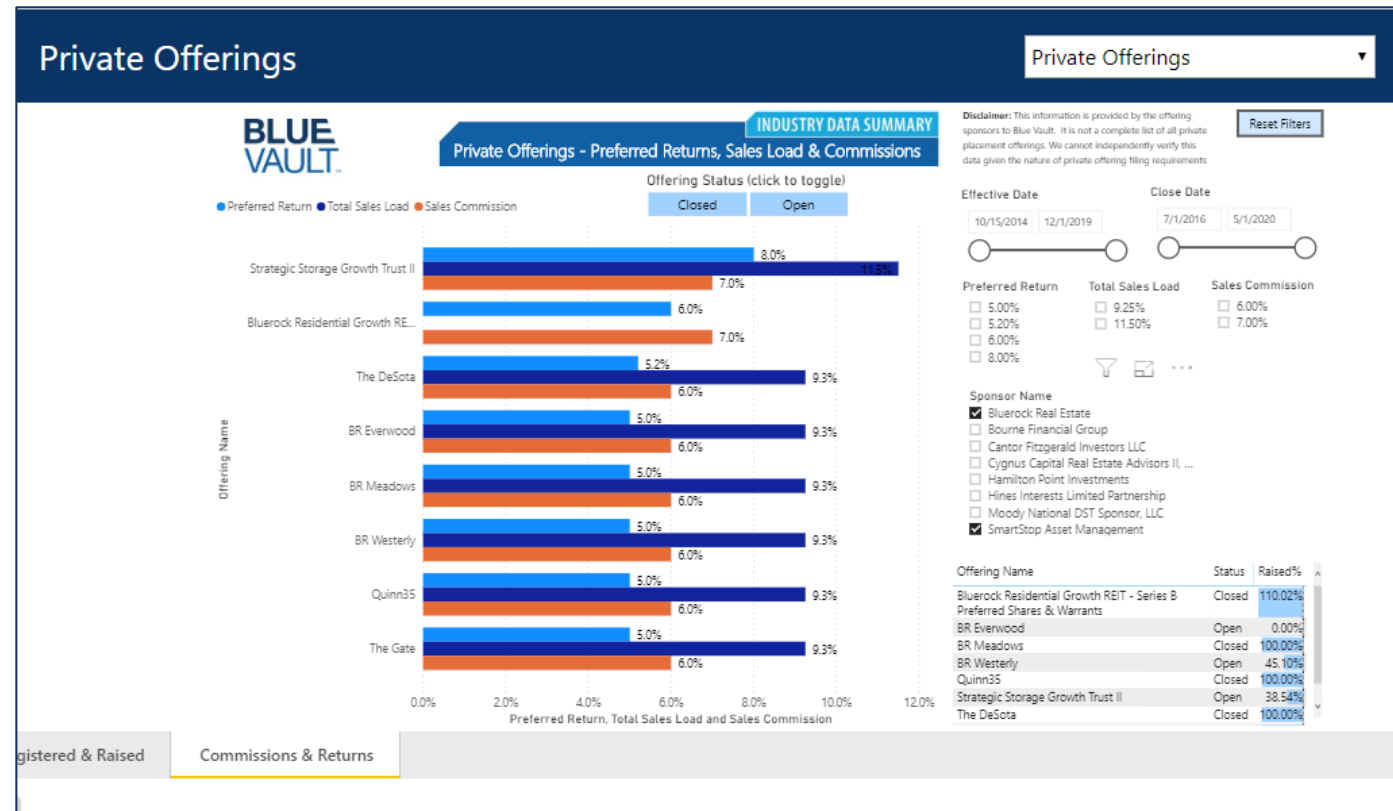
For those whose Broker Dealers are Blue Vault Partners:

- **Free access** to a custom set of our research
- **\$49** – Full access to our research

Introducing the Interactive Dashboards

Blue Vault has launched a new interactive dashboard, which allows our clients to query, search, compare, and contrast data related to asset managers and their securities offerings. New data sets are being released regularly. The most recent data set release covers private offerings. Subscribe to Blue Vault's research today to look for private offerings available for your use and track closed offerings as well.

Sell nontraded REITs? Track their performance with our research and query for comparisons. Now you're in charge, with Blue Vault's Interactive Dashboard.



bluevaultpartners.com/interactive-dashboards

About the Panel

Chris Goethe



Chris Goethe is a small business coach who helps individuals make the transition from working for others to becoming a successful entrepreneur. For the last four years, Chris has worked in the industry of franchising, helping others accomplish their dream of owning top-tier franchise brands.

Prior to his experience in franchising, Chris worked for a small business start-up in the Atlanta area, helping grow it, over nine years, to a robust, international training and consulting organization. Today, Chris coaches others and guides them through the process of business decision-making.

Rick Forbus, PhD



Rick holds a Doctor of Philosophy in Human Resource Management & Leadership, and he has studied Executive Coaching with one of the coaches at The Center for Creative Leadership in Greensboro, NC. Rick also studied at CoachU and George Washington University to increase his expertise in coaching and leadership applications to project managers. Rick is a full-time executive coach and professional trainer. He specializes in organizational re-design using behavioral and community-based action research techniques. He maintains an active speaking engagement schedule and is a highly sought-after corporate retreat and workshop facilitator. In his career, Rick has trained, coached or presented speeches to over 44,000 people. His areas of expertise include teambuilding, process consulting, high performance meeting and decision-making, vision casting, people alignment, negotiation and change management.

Rick, and his wife Nancy enjoy the beach and the mountains, and spend time at both as often as possible. Rick loves to play music, rock-n-roll to jazz and attends concerts and participates in informal jam sessions whenever possible. Rick is a watercolor and oil artist. (See Paintings tab) Rick & Nancy have two sons, six grandchildren and family events are fun-loving, loud and loaded with joking around. Rick and his sons spend as much time as possible in mountain streams fly fishing, traveling for pheasant hunting and general outdoors adventures. Rick's motto, "when in doubt, let's enjoy this!"

7 Ways to Build Your Client Base...the Right Way

Chris Goethe & Rick Forbus

T R O V E

INSIGHT. MINED AND APPLIED.



Chris Goethe

Rick Forbus

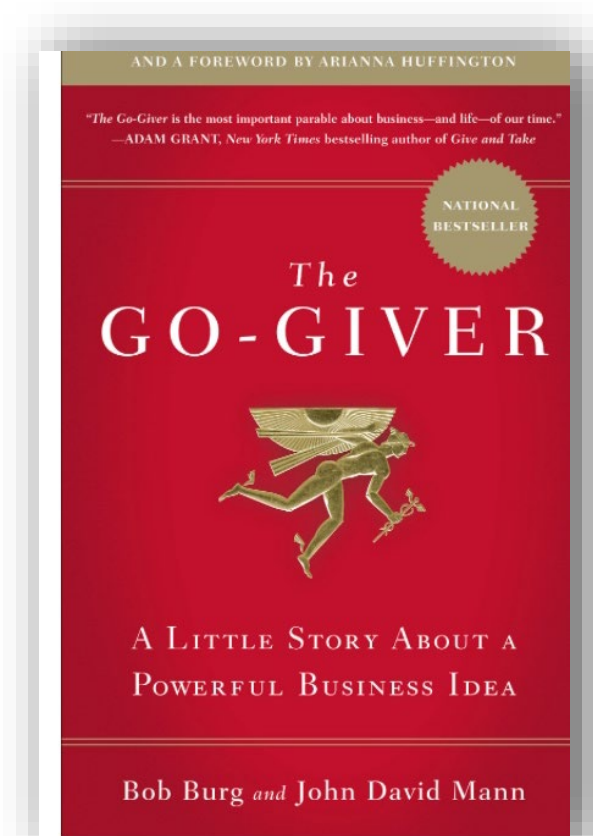
1. Write Blog/White Paper/Articles



2. Become More Active on LinkedIn/Facebook/Other



3. Help Them Get What They Want - Book, *The Go Giver*.



4. Sharing Data/Knowledge Through “Live” Lunch n’ Learns



5. Offer Your Topical Speaking Services to Networking/ Chamber/Companies



6. Be a Thought-Leader with Audio Podcasts



7. Conduct Webinar with Colleague



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Questions

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EDUCATIONAL SERIES

WEBINAR

Q1 2019 NTR/BDC Quarterly Review Summary

📅 June 18 @ 2:00 pm - 2:30 pm
Stacy Chitty | *Moderator*
Luke Schmidt | *Speaker*
James Sprow | *Speaker*



EDUCATIONAL SERIES

WEBINAR

Finding Value and Opportunities in the Commercial Real Estate Market

📅 June 27 @ 2:00 pm - 3:00 pm
Stacy Chitty | *Moderator*
James Barry | *Panelist*



PERFORMANCE SERIES

WEBINAR

A Deeper Look at Blackstone, Bluerock, and CION

📅 July 11 @ 12:00 am



EDUCATIONAL SERIES

WEBINAR

Are Interval Funds Performing?

📅 July 16 @ 2:00 pm - 2:30 pm
Stacy Chitty | *Moderator*
James Sprow | *Presenter*
Luke Schmidt | *Presenter*

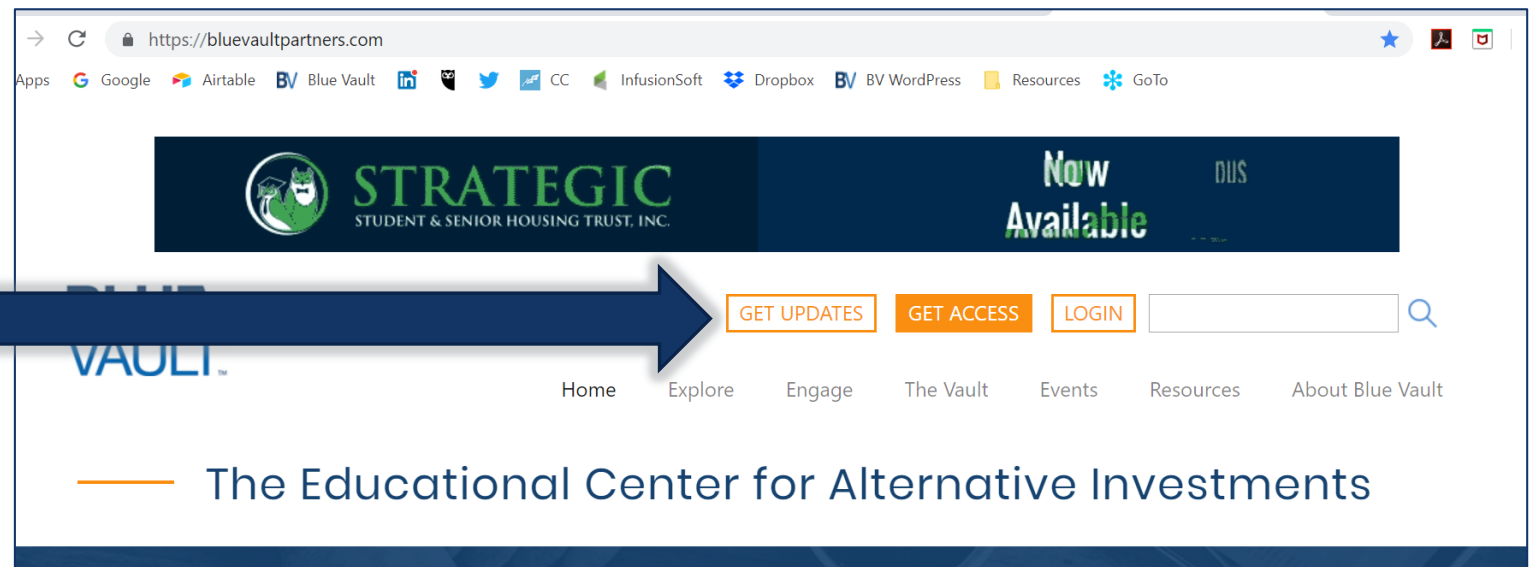
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Questions

Thank You!