



Michael Fugler Featured in REISA's FYI Magazine

Perdido Key, FL / PRBuzz.com / January 16, 2012 -- Michael Fugler featured in Real Estate Investment Securities Association (REISA) FYI magazine which gives "Timely insights from the Real Estate Investment Securities Association."

Mr. Fugler is featured in an article by Brandon Raatikka of FactRight, LLC, titled "REISA Webinar Discusses Social Media Use, Compliance" (see: http://reisa.org/media/?page_id=524).

Mr. Fugler stated, "Social Media is on everybody's mind today and if you haven't yet, now is the time to get on board. In the financial services industry you must be mindful that it is regulated so the Webinar REISA conducted focused not only on business but equally important, compliance, and Social Media use by Registered reps and investment advisers."

One of the more lively points of discussion centered on the question, At what point does enough connectivity through social media constitute a pre-existing substantial relationship for purposes of solicitation?

Although discussed at the outset of the presentation, Mr. Fugler's advice on the importance of traditional relationship building methods serves as an appropriate parting shot. Just because you belong to the same alternative investments group on LinkedIn does not mean you have a relationship with that person. As social media becomes more ubiquitous in practice, what might help you stand out and build your brand the best is to pick up the phone, which, incidentally, also once represented a revolution in communication technology.

REISA's "Social Media Compliance" webinar presentation is archived for viewing at http://reisa.org/media/?page_id=524. Additional social media resources can be found on [Michael Fugler's website](#).

Michael Fugler, Investment Banker, Attorney at Law www.michaelfugler.com
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Chairman, EURO Financial Network, Inc. www.eurofinancialnetwork.com
Deputy Chairman, Member Education Committee and Regulatory Committee, European Life Settlement Association (ELSA) www.elsa-sls.org

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Chairman, Real Estate Investment Securities Association (REISA) Marketing Committee
and member REISA Conference Planning Committee <http://reisa.org/>
Advisory Board, Financial Services Exchange (FSX) www.fsxone.com
Chairman, Past Chairmen's Committee, National Investment Banking Association
(NIBA); current Chairman Advisory Committee to the Board National Investment
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Mr. Fugler is a global expert and speaker on Longevity and Life Settlements and Entrepreneurship. He manages the strategic vision and direction for building Welcome Life as the global expert in longevity markets, offering institutional clients with trading, product development, capital raising and independent objective advice.

Mr. Fugler has been a licensed Attorney for 38 years developing an expertise in international law and finance, international investment and merchant banking. He has also been an Investment Banker for the past 16 of those years being FINRA registered with Series 7, 24, 63 and 79 licenses and establishing offices and providing extensive consulting and guidance to institutional investors throughout Europe and the USA.

Francis Grab, Washington Council, Ernst & Young

Francis Grab is a member of Ernst & Young's Washington Council practice where he advises clients on tax, budget and international trade issues. Prior to joining the firm, Grab served as the Tax and Trade Counsel for Representative Robert T. Matsui (D-CA), a senior member of the Committee on Ways and Means, for the 105th, 106th and 107th Congresses. In this capacity, he advised the Congressman on tax, pension and trade policy matters. He was the Principal House Democratic Staff Contact for the successful effort to pass Permanent Normal Trade Relations for China in the 106th Congress. Additionally, he served as the Chair of the Tax Policy Committee for the Barack Obama Presidential campaign. He received degrees from Swarthmore College and the Emory University School of Law. He also received an LL.M. in taxation from the Georgetown University Law Center.

Peter Montoya, Marketing Library

In the last 13 years, Peter has delivered over 1,500 presentations to financial advisors, developed more than 5,000 custom marketing plans, authored three best-selling books and is the father of two children. And he has just survived his one-millionth mile on United Airlines. To this end, he recently introduced the ultimate advertising compliance solution, "Marketing Library," which is revolutionizing the way financial advisers interact with their compliance officers, including the benefit of compliance pre-approval. Just one more way Peter is working to transform the way we do business. Obviously, he is committed to the success of his clients.

Daniel Rice III, BlackRock

Dan Rice is the Managing Director and Portfolio Manager at BlackRock. He is responsible for small cap and all cap energy funds. He is widely regarded as one of the



leading investors in the energy & resources segment and has been profiled in the Wall Street Journal, Barron's and other prominent publications. Prior to joining BlackRock in 2005, he was a Senior Vice President and Portfolio Manager at State Street Research & Management.

Joel R. Beck

Joel R. Beck is a lawyer and founder of The Beck Law Firm, LLC in metro Atlanta, Georgia. Joel's practice primarily focuses on broker-dealer and investment adviser regulation, representing firms and representatives in regulatory matters before FINRA, the SEC and state securities commissions. Joel also represents firms and representatives in arbitration cases, and provides counsel relating to general compliance issues. From time to time, Joel works as a consultant to other attorneys in securities regulatory matters and has testified as an expert witness in securities-related litigation. He has also worked as an independent consultant for a broker-dealer to satisfy undertakings imposed by the SEC.

Prior to opening The Beck Law Firm, LLC, Joel worked at NASD (now known as FINRA) for ten years, including six years as an attorney in the Enforcement Department. There, Joel litigated cases involving penny stock fraud, misrepresentations and omissions of material facts, unsuitable recommendations, unauthorized trading, forgery, supervision, selling away, conversion of funds and other violations. Additionally, while at NASD, Joel also worked as an examiner in the Member Regulation Department, and as a paralegal in Enforcement at NASD.

He publishes a blog on legal and compliance issues for broker-dealers and investment advisers that can be found at www.bdlawblog.com.

Paul Karasik

Paul is a leading authority in the financial industry. He is the president of The Business Institute, a sales and management training and consulting company. Paul has devoted 18 years to helping America's financial industry professionals achieve their goals. Paul is the author of four all-time business classics, *Sweet Persuasion* and *Sweet Persuasion for Managers*, published by Simon and Schuster and *How To Make It Big In The Seminar Business* and *Seminar Selling: The Ultimate Resource Guide for Marketing Financial Services*, published by McGraw-Hill. His most recent books are *How to Market to High-Net-Worth Households* and *Brilliant Thoughts*. He is regularly featured in the leading financial industry publications including *Investment Adviser*, *On Wall Street*, *CFP Today*, *Registered Rep*, *National Underwriters* and *Bank Investment Marketing*.

Paul is the founder of the American Seminar Leaders Association and a popular presenter at national meetings and conferences.

Anthony P. Lombardi, Perfect Client Founder

Anthony Lombardi, an accomplished athlete, successful business owner and restaurateur, has spent his adult life redesigning his businesses to fit his lifestyle, and

not the other way around. An entrepreneur by nature, Anthony sold his restaurants 15 years ago and turned his considerable talents towards a career as a financial advisor. After experiencing the inefficiencies inherent in the financial services industry, he decided to change the way he does business forever and in the process has found a much more efficient and effective way for all financial advisors to operate.

Anthony realized that in order to take his practice to the next level, he had to take some time off from working directly with end-user clients in order to focus his practice on developing strategic relationships with Centers of Influence (COI), specifically CPAs, Attorneys, and Private Bankers that represent the demographic Anthony wanted to work with. While many advisors have attempted to work with COI in the past, Anthony has truly "cracked the code", and perfected this first-of-its-kind system, called The Perfect Client - A Better Way!

Anthony has been perfecting the art and science of building strategic, leveraged relationships with Centers of Influence and has trained hundreds of Financial Advisors how to supercharge their practice by using The Perfect Client System. Anthony now enjoys a practice where there is virtually ZERO marketing expenses, ZERO prospecting, selling to or closing prospects, while new business is consistently delivered through the CPAs, Attorneys, and Private bankers in Anthony's network. The time that Anthony used to spend on prospecting, marketing, and working on his business - he now devotes to his faith, family and friends.

Real Estate Investment Securities Association (REISA) <http://reisa.org/>

The Real Estate Investment Securities Association (REISA) is a national trade association serving professionals who offer and distribute all forms of real estate investment securities. Established in 2003, REISA promotes the highest ethical standards to its members as well as provides education and information to the entire real estate securities community.

REISA members include: registered representatives, registered investment advisors (RIAs), broker-dealers, sponsors, qualified intermediaries, lenders, attorneys, CPAs, mortgage brokers, consultants and other affiliated professionals.

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