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**Behavioral Portfolio® CE Credit Webinar Email Invitation Series**  
**Email 1   
Link header image to Zoom registration**  
**Image Behavioral Portfolio Email Header**  
**Subject:** Conquer Volatility. Captivate Clients, Live CE Webcast [Date]  
**email preview pane:** Dive deeper into The Behavioral Portfolio, a game changing investing & client communications framework.  
**List:  
Sender:**   
**Send date** 3-5 weeks out  
  
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Hi Advisor first name,

Right now, advisors have a second chance to hedge portfolios against declines and turn market swings into growth potential for clients. *Don’t miss The Behavioral Portfolio®*, a game-changing live webinar. Phil (Felipe) Toews and [Emcee/company] will reveal strategies to build truly resilient portfolios that navigate all types of markets and curb investor biases – two keys to boost client confidence and practice growth.

Weekday Month/Date at time EDT Register now: [Link to Registration]  
  
Get smart insights from the book to help elevate your client investing experience, available on Amazon: [Link to Amazon Book Page]. <https://www.amazon.com/Behavioral-Portfolio-Managing-Portfolios-Investor/dp/0857197444>

See you online soon!

*This program offers one hour of continuing education (CE) credit by the Certified Financial Planner Board of Standards for the CFP® designation, The Investment and Wealth Institute for CIMA®, CPWA®, RMA®, and CIMC designations.*  
  
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**Email 2:**  
**Link image to Zoom registration**   
**Subject:** Struggling with Client Behavior? Get CE Credit & Strategies [date] CE Webcast  
**Email preview pane:** Monetary and fiscal policy is drastically changing. You may need to rethink your portfolios.  
**List**   
**Sender**   
**Send Date** 2-4 weeks out

Hi Advisor first name,

Are your clients' portfolios vulnerable to devastating losses and the emotional stress that comes with it? Get a modern investing framework with Phillip (Felipe) Toews, author of *The Behavioral Portfolio®* [Weekday Month/Date at time EDT]. Together with [Emcee/company], you’ll learn strategies for "all-seasons portfolios" that address severe market risks and keep clients on track. Earn CE credit and help future-proof your practice.

**Save Your Spot: [Link to Registration]**  
  
Get smart insights from the new book that had lines out the door at Orion Ascent, available on Amazon: [Link to Amazon Book Page]. <https://www.amazon.com/Behavioral-Portfolio-Managing-Portfolios-Investor/dp/0857197444>

See you online soon!

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Email 3: Longform email  
Link image to Zoom registration   
Subject:** **Market Volatility & Your Clients: Master The Behavioral Portfolio CE Credit (6/17)   
Email preview pane:** Clients worried? Discover one key behavioral strategy to calm chaos and drive growth.   
**List**   
**Sender** Marketing  
**Send Date,** 1-2 weeks out

Hi financial advisor first name,

Market volatility keeping you (and your clients) up at night? There's a better way. Join Phillip (Felipe) Toews, CEO of Toews Asset Management and author of The Behavioral Portfolio®, for an exclusive webcast [Weekday Month/Date at time EDT].

Felipe will dial in on strategies that aim to manage risk and minimize loss while participating in market gains, even in volatile or stagnant markets. Move beyond traditional stock-and-bond allocations and explore a modern investment framework designed to address market contingencies, and – most importantly – how to easily communicate these strategies to your clients.

**Space is limited. Register now: [Link to Registration]**

A group of people at a convention

AI-generated content may be incorrect.Get smart insights from the book that had lines out the door at national conferences, available on Amazon: [Link to Amazon Book Page]. <https://www.amazon.com/Behavioral-Portfolio-Managing-Portfolios-Investor/dp/0857197444>

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