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Theresa Rosen Attends National Educational Conference for Financial Advisors

Local Financial Advisor Theresa Rosen Attends Commonwealth Financial Network's Annual Conference

Sudbury, Massachusetts (November 29, 2016)—Theresa Rosen, CFP®, CLTC founder of Prudence Financial, Inc. in Sudbury, MA, recently attended a national educational conference for independent financial advisors. Hosted by Commonwealth Financial Network®, the nation's largest privately held independent broker/dealer–RIA, the event drew 1,750 affiliated advisors, staff, guests, and sponsors from across the nation. Participants gathered in Austin, Texas, November 3–6, 2016, where they connected and collaborated with peers, colleagues, and industry partners to strengthen their leadership skills and enhance the high-end service that they provide to clients.

The conference theme, "Silver Linings: Transforming Obstacles into Opportunities," encouraged attendees to embrace the power of perseverance and optimism and to seize on possibilities and a positive outlook for the future. The conference provided advisors with thought-provoking insights on advanced leadership and offered valuable, concrete strategies for turning challenges into opportunities for growth, setting achievable goals, and motivating others while staying true to what advisors and their practices stand for.

Members of Commonwealth's management team addressed attendees. Wayne Bloom, CEO, spoke straightforwardly on the firm's decision-making process—addressing DOL directly, planning for the future, and affirming Commonwealth's resolute, long-term commitment to its advisors. Rich Hunter, president and COO, emphasized how Commonwealth's scale and flexibility, along with the firm's "tool kit" of personnel, technology, and product solutions and support, have Commonwealth advisors well positioned in the industry.

Darren Tedesco, managing principal, innovation and strategy, shared Commonwealth's recent technology enhancements and upcoming plans, along with ways to leverage the firm's technology to work smarter. Brad McMillan, chief investment officer, provided perspective on the markets and economy.

Renowned keynote speakers offered topical remarks tailored specifically to an advisor audience. Daymond John, *Shark Tank* investor, founder and CEO of FUBU, spoke to the fundamentals of success in business and life. Award-winning broadcast journalist Dan Rather candidly addressed his audience, offering leadership principles garnered from his personal interactions with world leaders over the decades. He encouraged all to hone listening skills and to practice gratitude, humility, and modesty. Jill Morgenthaler, retired colonel, discussed the power of persistence and offered strategies for overcoming obstacles and motivating others while staying true to oneself. Marty Sandler, author, Emmy® Award-winning producer, made the history of accomplishing the seemingly impossible come alive through storytelling—sharing valuable lessons along the way. Fabio Zaffagnini, who organized 1,000 musicians in a field in Italy to play a tribute to the Foo Fighters to convince the band to play a concert at a small venue in Cesena, Italy, was a surprise guest. By using the power of social media and positive thought, the Rockin'1000 video went viral and has now been viewed more than 33 million times. Fabio delivered a powerful message that anyone can make anything happen and evoke real change

Rosen commented that it was inspiring to hear about other humans taking what was deemed impossible to be possible. "Nothing is impossible will be my mantra in 2017 and beyond."

Advisors attended a wide array of educational sessions, panel discussions, and networking events on topics ranging from wealth management, marketing, and trust and tax strategies to information security and maintaining a compliant online presence in an evolving social media world.

"It was our privilege to host Theresa at our 2016 National Conference," said Wayne Bloom, CEO of Commonwealth. "This year's conference—Commonwealth's largest educational event—was remarkable, including four full days of intensive learning, listening, and connecting for nearly 1,000 advisors from across the country. Equally important to us, the conference provided valuable one-on-one time, giving Theresa the opportunity to reconnect with long-term friends, as well as to welcome new advisors into our community."

Bloom added, "A major ingredient in Commonwealth's unique recipe is how we have always incorporated feedback from our advisors—and today, these lines of communication are as critical as ever. Transparent, candid conversations with our valued advisors drive our business decisions and ensure that, even in changing times, we continue to support Theresa in running her business her way."

Bloom concluded, "We have an incredible community of advisors, and we thank Theresa Rosen for her support and active participation. We will continue to provide the tools and resources that benefit Prudence Financial and support their practice in the most client-forward way."

About Prudence Financial, Inc.
Theresa Rosen has been providing individuals and organizations with financial guidance since 1986. Located at 365 Boston Post Road, Suite 203, Sudbury, MA the firm prides itself on crafting unique strategies for each client. For more information, please visit www.PrudenceFinancial.com. Securities offered through Commonwealth Financial Network®, member FINRA/SIPC, a Registered Investment Adviser. Advisory services and fixed insurance products and services offered through Prudence Financial, Inc., a Registered Investment Adviser.

About Commonwealth Financial Network
Founded in 1979, Commonwealth Financial Network, member FINRA/SIPC, is the nation's largest privately held independent broker/dealer–RIA, with headquarters in Waltham, Massachusetts, and San Diego, California. The firm supports more than 1,650 independent advisors nationwide in serving their clients as registered representatives, investment adviser representatives, and registered investment advisers, as well as through hybrid service models. For more information, please visit www.commonwealth.com.

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