



## Business Ethics Presentation for Financial Services and Insurance Professionals

Approved for 2-hours of ethics continuing education credits for CFPs  
Approved for continuing education credits for insurance agents and brokers\*



International Speaker, Trainer and Consultant **Patrick Kuhse** is one of the most in-demand speakers on business ethics and critical thinking skills in America today. A favorite in the financial planning community and on college campuses, his dynamic presentations have entertained, enlightened and inspired participants both domestically and internationally.

This business ethics and critical thinking skills presentation will revolve around the processes and consequences of unethical behavior and how "seemingly unimportant decisions" can cause so much trouble in our lives. Patrick will highlight common ethical dilemmas in the financial services and insurance industry and discuss why people make the ethical decisions they do. He will also provide insight on how to define, develop and control your own ethical behavior.

### Presentation Topics:

We will examine the ethical dilemmas that financial planning practitioners and insurance representatives face in today's market including:

- Unscrupulous Practices – 8 Thinking Errors That Wreck a Career
- Insurance & Financial Fraud – Why it Happens
- Doing the Right Thing: How to Balance your Pocketbook with your Conscience
- The Psychology of Ethics: Why Smart People Can Do Such Dumb Things
- Defining and Developing your Own Personal Code of Ethics
- Self-Renewal: Mastering Change & Dealing with Adversity

### Speaker Bio:

**Patrick Kuhse** was a Certified Financial Planner (CFP) and Registered Principal for many years, working at many levels in the financial services industry from Registered Representative to Regional Vice President of a major financial services company. He will share his journey from prominence as a successful stockbroker in San Diego to his involvement in a financial fraud scheme, flight from the US to avoid prosecution, life as an international fugitive for four years and his subsequent self-surrender and incarceration for several years in both a foreign jail and U.S. prisons.

Patrick serves as an appointed Ethics Fellow for two major universities:

**University of Florida** - Poe Center on Business Ethics, Warrington College of Business Administration  
**Suffolk University** – Institute for Executive Education, Sawyer School of Management.

\*Confirm with your association or professional group in advance to verify if this program meets continuing education requirements

#### **Patrick J. Kuhse**

International Speaker, Trainer & Consultant on Business Ethics

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## A Partial List of Patrick's Clients:

### **Professional Businesses and Associations**

AgFirst Farm Credit Bank  
ACFE - Association of Certified Fraud Examiners  
AICPA - American Institute of Certified Public Accountants  
AmCham - Costa Rican - American Chamber of Commerce  
American Society for Quality  
American Society of Mechanical Engineers  
American Society of Women Accountants  
Association of Government Accountants  
Association of Health Underwriters  
Association of Professional Consultants  
Boeing Company  
California Municipal Treasurers Association  
California Society of Association Executives  
California Society of CPAs  
California Society of Municipal Finance Officers  
Commonwealth Financial Network  
Eaton Vance  
Executive Women International  
Fast Company Magazine  
Financial Executives International  
Financial Planning Association  
First Republic Bank  
FSC Securities Corporation  
Fusion Financial Group  
Gen-Probe Corporation  
Independent Insurance Agents and Brokers of America  
Institute of Management Accountants  
Institute of Real Estate Management  
International Association of Administrative Professionals  
IMCA - Investment Management Consultants Association  
Lincoln National Life  
LPL Financial Services  
Marathon Oil Company  
Mass Mutual  
Merrill Lynch Trust Company FSB  
Met Life  
MFS Investment Management  
Military Officers Association of America  
Minnesota Society of CPAs  
National Association of Government Communicators  
National Association of Independent Life Brokerage Agents  
National Association of Insurance and Financial Advisors  
NAPFA - National Association of Personal Financial Advisors  
National Association of Purchasing Managers  
National Litigation Support Services Association  
National Recreation and Parks Association  
National Society of Hispanic MBAs  
Nationwide Financial  
Northrop Grumman  
Portland General Electric  
Pratt and Whitney  
Professional Management Convention Association  
Risk Management Association  
Russell Investments  
Scottsdale Healthcare  
Sempra Energy

Siemens Corporation  
Society for Human Resource Management  
Society of Financial Service Professionals  
TD Ameritrade  
US Air Force  
US Army  
US Marine Corps  
US Jaycees National Convention  
Wachovia Bank  
Warrant Officers Association  
Wealth Management Institute  
World President's Organization  
Young Presidents Organization

### **Educational Institutions**

American University  
Arizona State University  
Boston University  
Brigham Young University  
Creighton University  
Georgetown University  
Harvard University  
Indiana University  
Iowa State University  
Kansas State University  
La Salle University  
Cornell University  
University of Minnesota  
Marquette University  
Massachusetts Institute of Technology  
Northeastern University  
Old Dominion University  
Oregon State University  
Penn State University  
Pepperdine University  
San Jose State University  
Stanford University  
Suffolk University  
Syracuse University  
University of Arizona  
University of Arkansas  
University of California Los Angeles  
University of Florida  
University of Hawaii  
University of Iowa  
University of Kansas  
University of Maryland  
University of Michigan  
University of Minnesota  
University of Missouri  
University of Nebraska  
University of Pennsylvania  
University of Southern California  
University of Tennessee  
University of Texas at Austin  
University of Washington

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