



BRING JEFF LANZA TO YOUR NEXT CLIENT APPRECIATION EVENT

RETIRED FBI SPECIAL AGENT | CYBERSECURITY & FRAUD EXPERT

A Turnkey Client Event financial advisors host to deliver real value, deepen trust, and protect the people who matter most to their business.



JEFF LANZA
Keynote Speaker

AT A GLANCE

- ★ 20+ years as an FBI Special Agent
- ★ Investigated cybercrime, fraud & identity theft
- ★ National keynote speaker & author of two books
- ★ Featured on national TV and in a Netflix documentary
- ★ Lectured at Harvard and Princeton
- ★ Presents live or virtually, nationwide

GIVE YOUR CLIENTS THE BRIEFING THEY WON'T GET ANYWHERE ELSE

Scams are more convincing than ever — AI-cloned voices, fake bank alerts, and official-looking texts and emails now target your clients every day. Jeff Lanza, a retired FBI Special Agent with more than 20 years investigating cybercrime and fraud, delivers a practical, engaging presentation that helps clients recognize the threats and protect what they've worked a lifetime to build. It's an education-based event that positions you as the advisor who looks out for more than just their portfolio.

WHAT JEFF COVERS

- ✓ **Phishing emails** & fraudulent links
- ✓ **Account takeovers** & password security
- ✓ **Romance & investment** fraud
- ✓ **Mail theft** & check fraud
- ✓ **AI voice cloning** & grandparent scams
- ✓ **Bank & government** impersonation scams
- ✓ **Identity theft** prevention & recovery
- ✓ **Practical safeguards** clients can use today

WHY HOST THIS EVENT

A high-value, non-salesy reason to bring clients and prospects together in one room — or online.

WHY JEFF

Real FBI stories, practical advice, and humor that keeps audiences engaged from start to finish.

WHY NOW

AI-enabled scams are accelerating — clients are asking questions advisors aren't equipped to answer.

SLOW DOWN • USE LOGIC, NOT EMOTION • VERIFY BEFORE YOU TRUST

“

The highlight of our event.

— Financial Advisor

“

Practical advice delivered with humor.

— Community Bank

“

Our clients talked about the presentation long after it ended.

— Wealth Management Firm

AVAILABLE LIVE OR VIRTUALLY • BOOK JEFF FOR YOUR NEXT CLIENT EVENT