Advisor Development
FINANCIAL RESOURCES GROUP

EARLY CAREER TRAINING

TURNING YOUNG MEN AND WOMEN INTO $500K+ ADVISORS

Too often advisors are left without meaningful training and mentorship when they enter the business. Often, they're the product of weak training programs in the wires or insurance companies when they first begin and they struggle to make it big in the business. This program, if they do the work, will get them all the skills they need to excel organically, and position them to take advantage of a huge wave of successions becoming available over the next decade. Scan the QR code to check out the testimonials from some of our recent graduates!

QUALIFICATIONS TO ENROLL

To be eligible for the training, you must meet the following criteria:

- You must have your series 7 and series 66, (or series 65 and 63) and life and health license in your home state.
- Newer-to-the-industry advisor with 10 years or less in the business.
- 35 years old or younger. Exceptions can be made for career changers.

HOW IT WORKS

There are four pillars to the training:

- Complete the 12-month online training program and complete all tasks associated with the training.
- Attend 1-hour weekly training calls Mondays from 9:00 to 10:00am for 12 months.
- Complete and obtain your CFP.
- Generate $100k of new, organic production as a result of the training.

This training shows you *exactly* how to pull it off. Completing the online training tells us you have the skill sets to be a big-time producer, the CFP tells everyone you have the planning skills, and a minimum of $100k in new GDC by the end of the third year, (many end up between $200-$300k), tells others you're a rain-maker. All requirements to take the helm of a practice that needs a successor! Complete this training successfully and we will not consider you graduated until you've eclipsed $500k+ in production.

YOU NEED A SPONSOR

We're going to surround you with successful people. It rubs off. Especially when they're investing in your success. And, you need someone to vouch for you as a driven candidate if we're going to sink a lot of time, effort and resources into your success.

If you're an early advisor in another advisor's practice, they're going to sponsor you. If you're working at LPL or an institution, you need their blessing and sponsorship. If you're an early advisor out there on your own, your BC can act as your sponsor. Three parties will be investing in your success – you, FRGIS and your sponsor.

WHAT DOES IT COST?

$2400 for three years to enroll and participate in the training, paid monthly through Square. There is an additional charge of 2% of GDC for five years from your enrollment date. For example, if you have an 85% payout, you will be re-coded to 83%. This structure allows for a revenue neutral approach to providing the program as part of FRGIS Services and provides flexibility for early-career advisors who leave the program early.

HOW TO ENROLL

Head to the Advisor Development portion of the FRGIS website, click "Learn More" in the Early-Career Advisor box, then click "Enroll Now" and follow the instructions. You'll need to upload your CRD and insurance licenses, complete your profile and name your sponsor. Once completed you will receive an invitation to review the program with the AD team and invoicing from Square. Once paid, you will receive an invitation to the Thinkific Educational Platform with full access to the training.

EARLY CAREER TRAINING FAQ's

1. Can I enroll if I'm missing one of the licenses required?

Yes, but you will need to add any missing licenses as your number one priority, in addition to the training you'll be doing. We suggest full licensure first.

2. To meet the production requirement, can I include revenues I'm already generating?

No. We will be measuring your starting point. From there we will have you on a track to earn an additional $100k, minimum, over the course of three years as a result of this training. Most advisors easily surpass this requirement and end up between $2-300k by the end of year 3.

3. Once I complete the training, do I have to do an acquisition?

No. Some advisors start doing so well from the training that they build their practice organically past the 500k mark. But we would encourage you consider all M&A deals once you are through the training because it's smart business.

4. What's the difference between this program and the offered through Advisor Institute through LPL?

- Advisor Institute's Signature program requires you to become an LPL employee for 12 months.
- Pricing differential is significant.
- Advisor Development is headed by a 2.5M producer and LE Manager. LPL provides training through their corporate staff.
- AD provides training and mentorship through to 500k+ for those student that meet all requirements.
- AD is geared toward preparing you for excellent organic growth as well as for acquisitions.

5. What sort of time commitments are involved?

That's entirely up to you. Do you want to be that next million-dollar producer, or not? During the week, your only obligation is our Monday AM calls and a few group assignments throughout the year.

To complete the 12-month training program on time, you can anticipate an additional 2-3 hours per day, (after normal working hours of course), of studying, practicing, recording and executing on what you learn, for an entire year. To do a great job, you'll be working an additional 10-15 hours a week, sometimes more. Some students move quickly and finish in 8 months so they can get on to their CFP studies, some it takes the full 12 months. The more you apply yourself, the faster it goes.

SCAN THE QR CODE TO LEARN MORE ABOUT OUR ADVISOR DEVELOPMENT PROGRAM OR CONTACT YOUR DEDICATED BUSINESS CONSULTANT.