Financial Resources Group
Investment Services
Your Financial Advising Journey in Motion

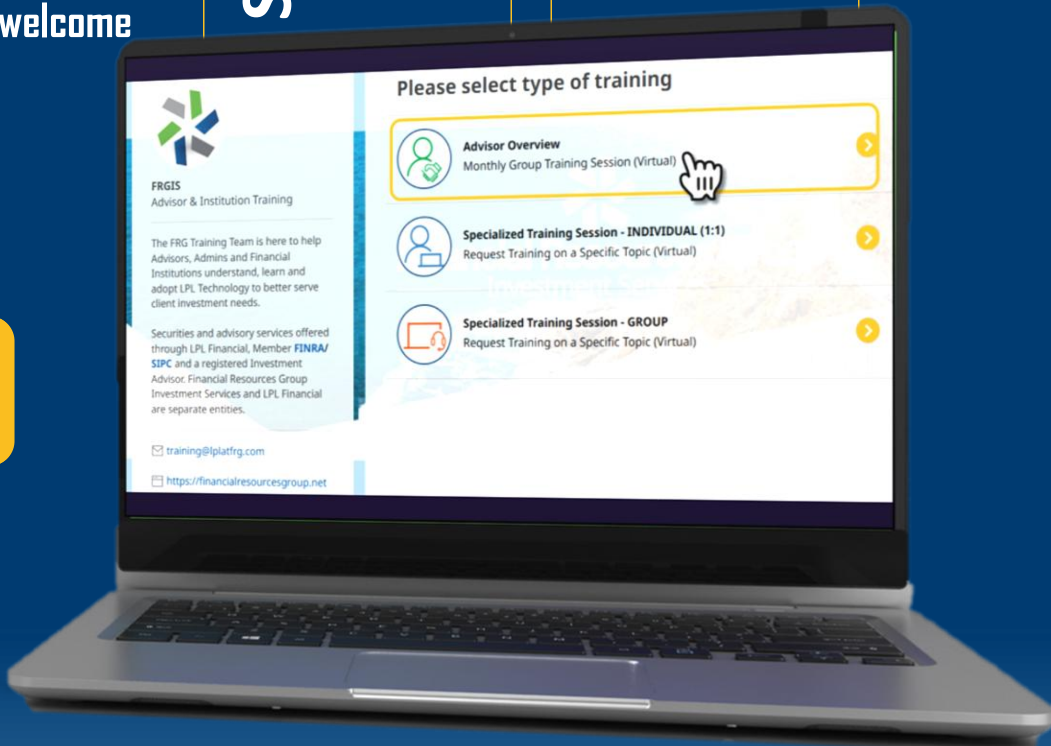
The Advisor Overview Training Series is a three-day live virtual group training hosted monthly by the FRGIS Advisor & Institution Training Team via WebEx from 1PM – 3PM Eastern Time *(each day)*. Advisors and support staff are all welcome to join this training!

September	
Tuesday	16
Wednesday	17
Thursday	18

October	
Tuesday	14
Wednesday	15
Thursday	16

REGISTER HERE!

QUESTIONS? Click here to send us an email!



Our Agenda:

Day 1

- Introduction to LPL and Financial Resources Group Investment Services (the largest OSJ at LPL).
- Learn how to navigate ClientWorks and connected tools.
- Live demo of opening an account and how to use eSignature.

Day 2

- Live demonstrations of the Account Transfer and Move Money tools.
- Learn how to use iDoc to set up required books and records files to maintain a compliant office.

Day 3

- Learn how to use the trading tools integrated into ClientWorks to place trades for mutual funds, equities, options, fixed income and annuities.
- Discover other technology tools for CRM, Performance Reporting, Financial Planning and Proposal Generation