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!

March

Tuesday **10**

Wednesday **11**

Thursday **12**

April

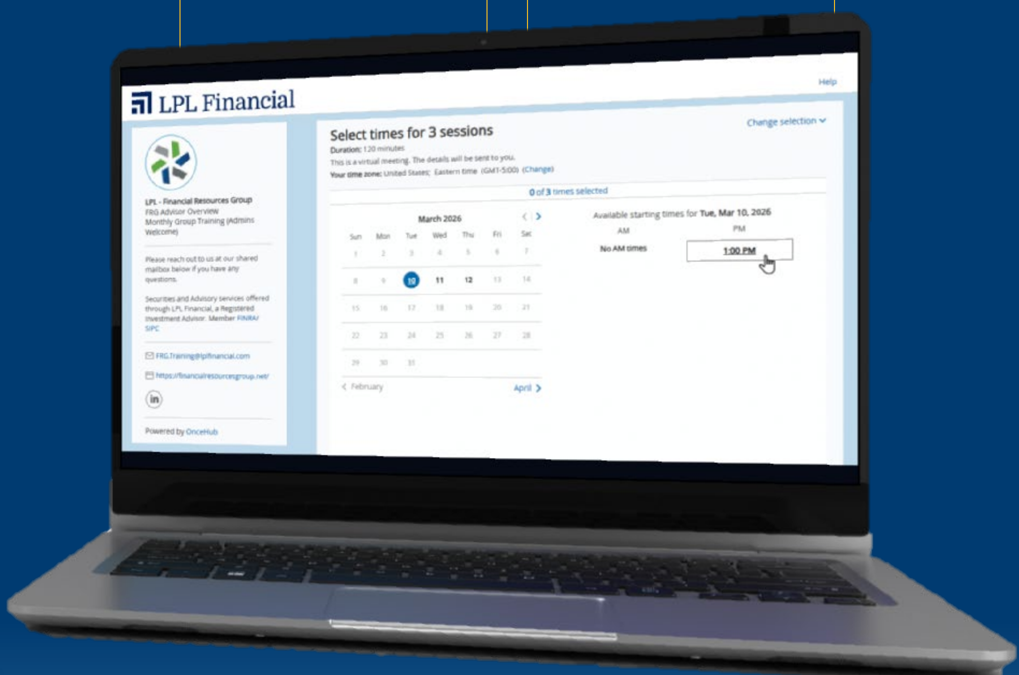
Tuesday **14**

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