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Case Study: Connecting the dots - How Cannon classes helped one student further his career

"I went to Cannon my first year when I was a full-time employee, and I knew that it was a step that I needed to take to further my career."

Ben Pringle, in his third year at Cannon Financial's Personal Trust Schools, has learned first-hand the value he could get from these classes. A trust administrator at a California-based financial institution, Pringle was once a touring musician with one foot in wealth management and the other on stage.

Eventually, he was ready to make a permanent transition into his desired career. While one of Cannon's primary goals is to prepare students for Certified Trust and Financial Advisor certification, there is so much more value for the classes' many attendees.

For Pringle, that meant gaining a holistic picture of his profession. While making the switch from touring musician to trust administrator, he quickly learned about the duality of the industry - there is the academic side, like the CTFA, for example, and the practical side, such as client-advisor relationships and the wealth management problems people face on a daily basis.

As Pringle explained, Cannon has evolved to include best practices along with the necessary education, and he added that "there may be a perspective that we're not thinking about as institutions. There's the academic part of it - of getting the basic fundamentals - and also the experience of working with a lot of other people."

Education helps boost careers

Pringle has also been recently promoted to his current position as trust administrator. And Cannon's education was an integral part of that step up in his career. He explained that it can be challenging to get the whole picture of what makes for an effective financial advisor, and Cannon can help fill in the blanks about what goes on in this industry.

"Especially in a larger institution ... nobody really does all the pieces, so you might have experience in certain amounts in the things you're supposed to know how to do, and then other things are farmed out to different groups," Pringle pointed out. "With Cannon, you're really getting knowledge about all the different pieces, even if you don't touch it every day."

He further described that with Cannon's courses, he was able to go beyond what was simply taught in the class. Due to the availability and willingness of the instructors, Pringle found it easy to talk to one after class and ask for more information.

Classes provide flexibility

For Pringle, Cannon's Personal Trust Schools provided an annual recess from his day-to-day job, giving him the opportunity to expand on his knowledge and come back better prepared for his clients' needs. That once-a-year feel worked for him, but other students prefer a crash course in financial advising. Cannon provides flexibility - you can go Pringle's route, visiting one campus per year, or you could crisscross the country sitting in on all of them.

"I like doing it annually because you learn the stuff and then you go back to your shop and ruminate on it, and you build that understanding," he revealed. "Then you come back, learn more, go away and come back."

No matter the strategy, Pringle observed that the real world experience would be passed along to the student. You learn it, and then you can take that knowledge back to the clients and avoid running into those "I don't know" moments again.

Training is a constant process

"Cannon connects all the dots," Pringle proclaimed, adding that you may not know why certain parts are moving in your business, but these classes help put the pieces together so you can effectively do your job a whole lot better.

The best part is that the educational process is ongoing. The financial industry is constantly changing, with new rules and regulations appearing often, and Cannon classes can be valuable early on in your career or later in life. With this instruction, students can gain a new perspective, dig deeper and see how everything fits together.

"The on-the-job training in a big corporation, you only train on that one thing or you only do these certain things," Pringle concluded. "But there's a bunch of stuff you know that sort of happens magically and you don't understand it all. I've always been the kind of person that wants to see the whole picture."

With his Cannon education in hand, he is able to bring some of that teaching acumen back home to his clients. As a trust administrator, he is the first person his clients go to with questions. In the back of his head are his instructors' voices, helping him come up with the right answers.

To find out more about what Cannon can do for you, contact our Schools specialists at 706-353-3346 or visit www.cannonfinancial.com.