



# Accelerated Advisor Onboarding

## Program Objective:

Equipping new hires (Financial Advisors/FAs) with the knowledge and skillset required to deliver a comprehensive planning-centered client experience to HNW individuals.

## Projected Outcomes:

- **Streamlined Onboarding:** Equip your FAs with the skills necessary for efficient integration into a client-centric practice management environment.
- **Proficiency with Tools:** Attain mastery in utilizing software, empowering FAs to conduct comprehensive Gap Analyses effectively.
- **Tailored Recommendations:** Develop expertise among FAs to adeptly recommend and leverage the full spectrum of your in-house solutions, ensuring optimal client outcomes.

## Program Addresses the Following Challenges:

- New hires enter the role without foundational investment and financial planning knowledge.
- Current in-house training processes may lengthen the FA developmental trajectory.
- Retaining new hires and keeping established advisors engaged and committed remains crucial.

## Program Guiding Principles:

- **Focused Learning:** Our curriculum is tailored to ensure FAs receive relevant and impactful knowledge without overwhelming them.
- **Avoiding Over-specialization:** While niche knowledge can be valuable, we prioritize broad and universally applicable skills catering to most high-net-worth clients.
- **Balanced Approach:** We balance our content, ensuring FAs are well-prepared for diverse scenarios without overburdening them.

## Why Should You Consider Onboarding FAs Through Our Program?

- Incomplete training, inconsistent training, lack of specialized knowledge, increased operational risks, higher costs, less engagement and commitment, and lack of customization may hinder the effectiveness and efficiency of your internal onboarding processes.
- Without a structured and streamlined process, onboarding new FAs may take longer, delay their delivery of value to clients, and result in inconsistencies in their knowledge and skills.
- The proposed program provides specialized knowledge in various aspects of wealth management, such as investment planning, estate planning, risk management, tax planning, etc., and can be customized to meet the specific needs and preferences of your institution.

**\*Curriculum:**

**Module 1: Practice Management**

**Objective:** Equip advisors with the strategic and tactical capabilities to manage and grow their clientele efficiently.

**Module 2: Investing**

**Objective:** Provide advisors with a deep understanding of various investment strategies, tools, and considerations to guide their clients in wealth creation and preservation effectively.

**Module 3: Banking and Credit**

**Objective:** Provide advisors with comprehensive knowledge of modern banking and credit practices, especially tailored to high-net-worth clients.

**Module 4: Trusts**

**Objective:** Empower advisors with the expertise to guide clients in creating, managing, and benefiting from various trust structures and related legal entities.

**Module 5: Comprehensive Wealth Planning with Tools**

**Objective:** Introduce participants to the intricacies of financial and wealth planning, emphasizing the significance of individualized, client-centered strategies.

*\*The standard curriculum may be customized to meet your organization's specific requirements.*

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**\*\*Program Delivery Format:**

- **Blended Learning:** Combining the best of both worlds, participants will experience in-person and virtual live instruction via webinar.

*\*\*The delivery format can be customized to meet your organization's specific requirements.*