100 Day Plan for Wealth Advisor

Goals and Expectations:

Days 1 – 30:

Focus Area	Be Able To / Item to Complete
Team Integration	Meet with each department to understand how they add value to our team.
Carson Wealth Overview	Review the Carson Mission and Vision; understand the role of the Wealth Advisor, understand the client experience, review prospective client opportunities, learn about marketing tools and resources, and understand how to work with operations.
Value Prop	Review CW Value Proposition; understand importance of Wealth Enhancement Group; review training on investment management strategies and research.
Resources	Understand who to contact for various items both internally as well as vendors and custodians.
Salesforce CEO System	Review CEO Training, Dashboards, Sample Clients, Performance Reports, Sample Clients and Case Creation.
eMoney Financial Planning System	Review eMoney training and sample client plans.
Orion	Review Orion training.
Carson Partners Advisor Dashboard	Review Advisor Dashboard training.
Compliance	Understand various compliance requirements: daily, periodic, disclosures, and RIA vs. Brokerage.

Days 31 – 60:

Focus Area	Be Able To / Item to Complete
Client Meetings and Presentations	Attend as many calls and in-person appointments as possible.
Sales Process	Review and learn the entire sales process.
Advisor Training	Participate in events; develop metrics on successful activities.
Client Opportunities	Understand the process for new leads from the Managing Partner and/or marketing; understand the process for new leads from other CWM advisors; understand the process for personally-driven new clients.

Days 61 – 100:

Focus Area	Be Able To / Item to Complete
Client Meetings and Presentations	Attend as many calls and in-person appointments as possible.
Sales Process	Be able to articulate the Wealth Designed Life Defined process; utilize and document all client interactions.
Advisor Training	Provide feedback on areas for improvement.
Client Opportunities	Understand the process for retirement plans and unassigned clients.
Salesforce CEO System	Be able to navigate Salesforce CEO system.
Advisor Dashboard	Be able to successfully generate new account proposals; be able to track prospects through the sales process; be able to walk through the client dashboard.
eMoney Financial Planning System	Be able to navigate the system and build basic focused plans.