

Advisor Growth Path

Relationship Manager

- » Pass the necessary licensing exams.
- » Develop close mentoring relationships with your team members and others as necessary.
- » Sit in on and prepare client meetings for prospects and current client updates. Take notes and prepare thorough summaries for each meeting. Help with servicing duties.
- » Learn the financial planning function through mentoring and completing assignments.
- » Send follow-up documents.
- » Uphold the highest customer service and professionalism.
- » Learn and be able to articulate the firm's value proposition. Perform five mock prospect meetings and five mock client update meetings.
- » Maintain outstanding manager evaluations, and actively search for areas of improvement.
- » Perform any additional activities to support your team and the firm as a whole.

Experience	Licensed	Salary	Payout	Bonus	Equity
0-3 Years	No	\$55k	0	6%	No

Associate Wealth Advisor

- » Build relationships with current clients and prospects. Find at least 10 current clients or prospects who share a similar passion. Engage in an activity of shared interest.
- » Conduct follow-up and secondary meetings with client.
- » Begin passion prospecting and build your network. Join three or more local community/business organizations. Join local country club/golf course. Join a fishing club or find fishing friends. Join a hunting club or find hunting friends.
- » Develop social media market outlets and communicate with multiple generations.

Experience	Licensed	Salary	Payout	Bonus	Equity
0-6 Years	Yes	\$55k	3-5%	No	No

Wealth Advisor

- » Play key role as the first point of contact on advisor responsibilities.
- » Convert firm leads.

Experience	Licensed	Salary	Payout	Bonus	Equity
5+ Years	Yes	\$55k	10%	No	% of NNA Goal

Senior Wealth Advisor

- » Responsible for leadership and development of own team.
- » Rainmaking and business development.
- » Relationship management through team.
- » Responsible for booking over XXXM of NNA on a yearly basis.

Experience	Licensed	Salary	Payout	Bonus	Equity
8+ Years	Yes	\$55k	20%	No	Yes