ADVISOR EVOLUTION

NEW HIRE TRAINING SYLLABUS

2024

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HOW IT WORKS

OVERVIEW

This comprehensive training program is centered around the book "How to Build a Financial Therapy Practice," complemented by two specialized workbooks and an interactive edapp. The structure is designed to provide a holistic learning experience, combining theoretical knowledge with practical application.

Core Materials

1. Book: "How to Build a Financial Therapy Practice"

2. Workbooks:

   - *Advisor Evolution Daily Scorecard*: Tracks activities to optimize time and energy utilization.

   - *New Hire Skills Workbook*: Guides role-play scenarios during the new hire program.

3. Edapp: The Advisor Evolution edapp offers microlearning sessions and gamification of all program materials.

Weekly Schedule

- Monday: Review of the Daily Scorecard. Analyze last week's activities and set goals for the current week.

- Wednesday: Role-play sessions focusing on the client gathering process, allowing each participant to engage in live scenarios.

- Friday (Week 1): Discussion and overview of the current chapter from "How to Build a Financial Therapy Practice."

- Friday (Week 2): Exploration of reflection and discussion questions at the end of each chapter.

OVERVIEW

Edapp Learning

- <u>Weekly Courses:</u> Correlate with the current chapter in the main text and other training materials.
- <u>Interactive Learning</u>: Engaging microlearning sessions to reinforce and expand on the weekly topics.
- <u>Gamification</u>: Makes learning more engaging and aids in the retention of concepts.

Training Methodology

- <u>Socratic Approach</u>: Encourages critical thinking and active participation in discussions.
- <u>Preparation</u>: Participants are expected to read the assigned materials and complete edapp courses prior to each session.
- <u>Engagement</u>: Active involvement in discussions, role-plays, and edapp activities is essential.

Additional Features

- <u>Edapp Access</u>: A link to download the Advisor Evolution edapp will be emailed to each participant.
- <u>Feedback and Support</u>: Regular check-ins to monitor progress and provide support.
- <u>Certification</u>: A certificate of completion will be awarded to participants who successfully finish the program.

Expectations

- <u>Active Learning</u>: Come prepared to each session, having completed the readings and edapp courses.
- <u>Participation</u>: Engage in discussions, role-plays, and activities.
- <u>Collaboration</u>: Share insights and learn from peers for a richer learning experience.

This program offers a unique blend of structured learning, practical application, and innovative technology. It's designed not just to impart knowledge but to transform the way you approach financial therapy practice. Your active engagement will be key to making the most of this opportunity.

THE MATERIALS

HOW TO BUILD A PRACTICE
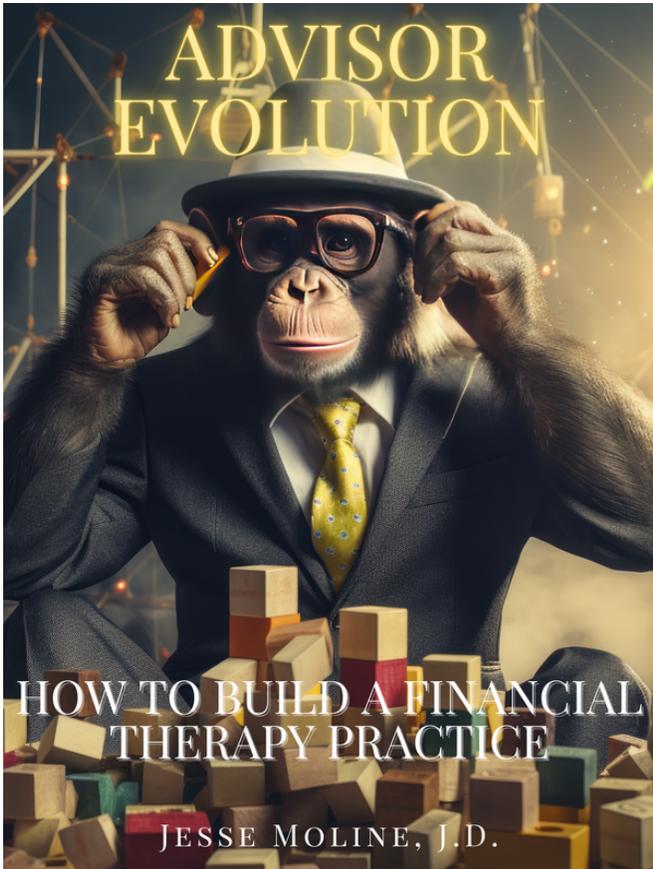
In a financial world dominated by sales targets and product-centric advice, "Advisor Evolution: Financial Therapy Unveiled" emerges as a trailblazing guide, steering the industry towards a profound transformation. This book is an indispensable resource for financial professionals seeking to transcend traditional advising methods and embrace a more holistic, client-centered approach.

This book introduces the concept of financial therapy, blending the precision of financial planning with the empathy and insight of psychological counseling. It challenges the outdated transactional models, advocating for a paradigm shift towards understanding clients' emotional and psychological ties to money.

Structured in three compelling parts, the book navigates through the evolving landscape of financial advising:

Part I: Evolving Paradigms: Delve into the limitations of traditional financial advising and witness the birth of a new, empathetic approach that places client relationships at the forefront.

Part II: Mastering the Intangibles: Explore the subtle arts of non-verbal communication, authenticity in client interactions, and the critical role of advocacy, reshaping the advisor-client dynamic.

Part III: The Empowerment Journey: Learn how to empower clients through financial literacy and participation, guiding them through the Stages of Change towards lasting financial well-being.

Each chapter of "Advisor Evolution: Financial Therapy Unveiled" is infused with practical insights, case studies, and strategies, making it a pragmatic tool for any financial advisor ready to embark on this transformative journey. It's not just about advising; it's about empowering, understanding, and evolving with your clients.

Join the evolution and redefine the essence of financial advising.

DAILY SCORECARD WORKBOOK

The Advisor Evolution: Daily Scorecard Workbook is an innovative tool designed for financial advisors committed to achieving professional excellence. Tailored to assist in tracking and maximizing daily activities, this workbook is a cornerstone for those seeking structured progress in their career.

Spanning a practical layout, the workbook encourages advisors to systematically record and evaluate their daily tasks. At its core is a unique point system, assigning value to a variety of activities crucial in the realm of financial advising. This includes making calls to prospects and clients, setting and attending meetings, working dedicated hours, and networking efforts. Each activity is allocated points, emphasizing their significance in building a successful practice: 1 point for each call and hour worked, 5 points for new prospects and meetings set, and up to 20 points for acquiring new clients.

The goal-setting aspect of the workbook is both ambitious and attainable, urging advisors to aim for 100 points daily, culminating in a weekly target of 500 points, 2,500 monthly, and an annual goal of 30,000 points. This systematic approach not only fosters a consistent work ethic but also allows advisors to concretely measure their progress.

Moreover, the workbook includes a reflective section for monthly and annual reviews, enabling advisors to introspect on what strategies worked, areas that need improvement, and how to adapt for future success. This aspect of self-assessment is crucial, as it fosters a growth mindset and encourages continuous learning and adaptation.

The Advisor Evolution: Daily Scorecard Workbook is more than just a tracking tool; it's a blueprint for success in financial advising. It guides advisors to focus on activities that yield the highest returns, both in terms of client acquisition and personal development. By committing to this disciplined approach, advisors can witness tangible growth in their professional journey, making this workbook an indispensable asset for anyone aspiring to thrive in the challenging yet rewarding field of financial advising.

NEW HIFE SKILLS WORKBOOK
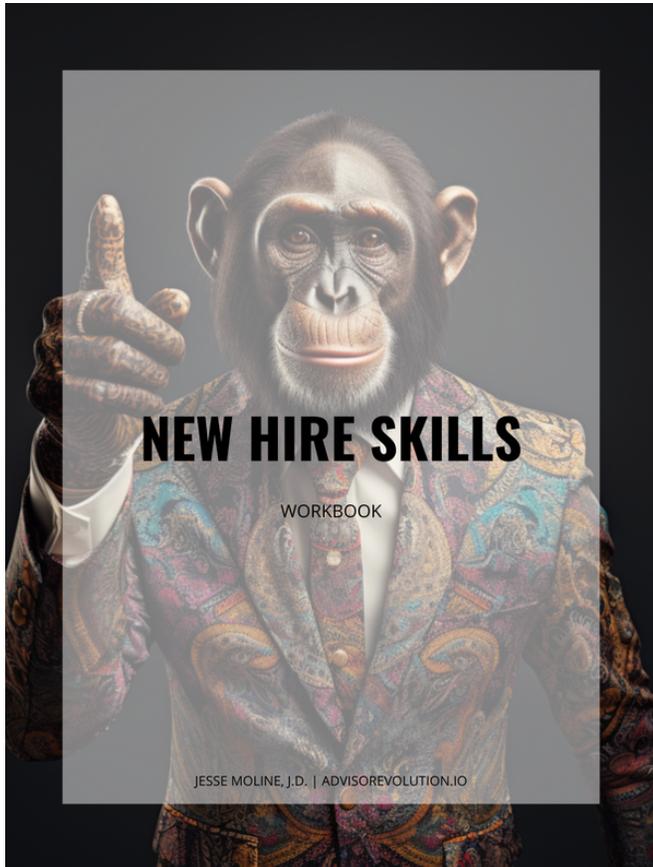
The New Hire Skills Workbook is a comprehensive guide designed specifically for new advisors entering the field of advisory services. This workbook is structured to develop and enhance the most crucial skills required for successful client engagement and relationship building in the competitive world of financial advising.

Introduction: The workbook begins with an introduction that emphasizes the importance of effectively marketing oneself and communicating one's value proposition to potential clients. It sets the stage for the practical, hands-on approach that the workbook follows, highlighting the significance of self-marketing in establishing a successful advisory career.

Skill 1 - Telephone Pre-Approach: Guides on initiating phone contact with prospects, covering call preparation, introduction, stating the call's purpose, and effectively handling responses.

Skill 2 - Opening an Introductory Meeting: Offers strategies for starting face-to-face meetings, including building rapport, explaining the meeting's purpose, and concluding with an engagement letter.

Skill 3 - Nominator Meeting: Teaches how to expand the client base through nominators, with tactics for gaining nominator affirmation and brainstorming potential contacts.

Skill 4 - Elevator Talk: Focuses on creating an impactful brief introduction for engaging new acquaintances and securing meetings.

Workbook Sections: Each skill includes practical exercises, role-play scenarios, and space for note-taking, aiming to apply concepts in real-life situations.

Overall, this workbook is a vital tool for new advisors, providing them with the knowledge and skills to thrive in the advisory field.

ADVISOR EVOLUTION EDAPP

EdApp is a progressive and versatile learning management system (LMS) designed to offer an engaging and effective eLearning experience. It stands out in the crowded field of eLearning platforms due to its unique approach to content delivery, customization, and user interaction.

A notable implementation of EdApp is seen in the Advisor Evolution program, which exemplifies the platform's capacity to enhance learning experiences. In this program, EdApp is utilized to provide a comprehensive course for each chapter of all five books used across their training programs. This approach offers a structured and in-depth learning journey for participants, ensuring that they can thoroughly understand and apply the material covered in these books.

The benefits of using EdApp, especially in the context of Advisor Evolution, are manifold:

- Microlearning: EdApp employs a microlearning approach, breaking down complex topics into smaller, more manageable segments. This makes learning less overwhelming and allows for better retention of information. Each chapter of the books in the Advisor Evolution program is transformed into bite-sized lessons, making it easier for learners to absorb and recall the material.

- Interactive Content: The platform's use of interactive elements like quizzes, games, and simulations enhances engagement and reinforces learning. This interactive approach is particularly beneficial in the Advisor Evolution program, where complex financial concepts and strategies are presented in an engaging and accessible manner.

In conclusion, EdApp's integration into the Advisor Evolution program showcases its ability to transform traditional learning materials into interactive, engaging, and effective digital courses. By leveraging EdApp's features, the program significantly enhances the learning experience for participants, ensuring they are well-equipped with the knowledge and skills necessary for success in their field.

JANUARY

Monday 1/8
Scorecard and Weekly Prep

Wednesday 1/10
Role Play

Friday 1/12
How to Build a Practice: Chapter 1

Monday 1/15
Holiday: No Training

Wednesday 1/17
Role Play

Friday 1/19
How to Build a Practice: Chapter 1

Monday 1/22
Scorecard and Weekly Prep

Wednesday 1/24
Role Play

Friday 1/26
How to Build a Practice: Chapter 2

Monday 1/29
Scorecard and Weekly Prep

Wednesday1/31
Role Play

FEBRUARY

Monday 1/29	Wednesday 1/31	Friday 2/2
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 2
Monday 2/5	**Wednesday 2/7**	**Friday 2/9**
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 3
Monday 2/12	**Wednesday 2/14**	**Friday 2/16**
Scorecard and Weekly Prep	Holiday: No Training	How to Build a Practice: Chapter 3
Monday 2/19	**Wednesday 2/21**	**Friday 2/23**
Holiday: No Training	Role Play	How to Build a Practice: Chapter 4
Monday 2/26	**Wednesday 2/28**	**Friday 3/1**
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 4

MARCH

Monday 2/26	Wednesday 2/28	Friday 3/1
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 4

Monday 3/4	Wednesday 3/6	Friday 3/8
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 5

Monday 3/11	Wednesday 3/13	Friday 3/15
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 5

Monday 3/18	Wednesday 3/20	Friday 3/22
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 6

Monday 3/25	Wednesday 3/27	Friday 3/29
Scorecard and Weekly Prep	Role Play	Holiday: No Training

APRIL

Monday 4/1	Wednesday 4/3	Friday 4/5
Holiday: No Training	Role Play	How to Build a Practice: Chapter 6
Monday 4/8	Wednesday 4/10	Friday 4/12
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 7
Monday 4/15	Wednesday 4/17	Friday 4/19
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 7
Monday 4/22	Wednesday 4/24	Friday 4/26
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 8
Monday 4/29	Wednesday 5/1	Friday 5/3
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 8

MAY

Monday 4/29	Wednesday 5/1	Friday 5/3
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 8
Monday 5/6	Wednesday 5/8	Friday 5/10
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 7
Monday 5/13	Wednesday 5/15	Friday 5/17
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 7
Monday 5/20	Wednesday 5/22	Friday 5/24
Scorecard and Weekly Prep	Role Play	Holiday: No Training
Monday 5/27	Wednesday 5/29	Friday 5/31
Holiday: No Training	Role Play	How to Build a Practice: Chapter 8

JUNE

Monday 6/3

Scorecard and Weekly Prep

Wednesday 6/5

Role Play

Friday 6/7

How to Build a Practice:
Chapter 8

Monday 6/10

Scorecard and Weekly Prep

Wednesday 6/12

Role Play

Friday 6/14

How to Build a Practice:
Chapter 9

Monday 6/17

Scorecard and Weekly Prep

Wednesday 6/19

Role Play

Friday 6/21

How to Build a Practice:
Chapter 9

Monday 6/24

Scorecard and Weekly Prep

Wednesday 6/26

Role Play

Friday 6/28

How to Build a Practice:
Chapter 10

Monday 7/1

Scorecard and Weekly Prep

Wednesday 7/3

Role Play

Friday 7/5

How to Build a Practice:
Chapter 10

JULY

Monday 7/1

Scorecard and Weekly Prep

Wednesday 7/3

Role Play

Friday 7/5

How to Build a Practice: Chapter 10

Monday 7/8

Holiday: No Training

Wednesday 7/10

Holiday: No Training

Friday 7/12

Holiday: No Training

Monday 7/15

Scorecard and Weekly Prep

Wednesday 7/17

Role Play

Friday 7/19

How to Build a Practice: Chapter 11

Monday 7/22

Scorecard and Weekly Prep

Wednesday 7/24

Role Play

Friday 7/26

How to Build a Practice: Chapter 11

Monday 7/29

Scorecard and Weekly Prep

Wednesday 7/31

Role Play

Friday 8/2

How to Build a Practice: Chapter 12

AUGUST

Monday 7/29	Wednesday 7/31	Friday 8/2
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 12

Monday 8/5	Wednesday 8/7	Friday 8/9
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 1

Monday 8/12	Wednesday 8/14	Friday 8/16
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 1

Monday 8/19	Wednesday 8/21	Friday 8/23
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 2

Monday 8/26	Wednesday 8/28	Friday 8/30
Scorecard and Weekly Prep	Role Play	Holiday: No Training

SEPTEMBER

Monday 9/2	Wednesday 9/4	Friday 9/6
Holiday: No Training	Role Play	How to Build a Practice: Chapter 2

Monday 9/9	Wednesday 9/11	Friday 9/13
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 3

Monday 9/16	Wednesday 9/18	Friday 9/20
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 3

Monday 9/23	Wednesday 9/25	Friday 9/27
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 4

Monday 9/30	Wednesday 10/2	Friday 10/4
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 4

OCTOBER

Monday 9/30

Holiday: No Training

Wednesday 10/2

Role Play

Friday 10/4

How to Build a Practice: Chapter 4

Monday 10/7

Scorecard and Weekly Prep

Wednesday 10/9

Role Play

Friday 10/11

How to Build a Practice: Chapter 5

Monday 10/14

Holiday: No Training

Wednesday 10/16

Holiday: No Training

Friday 10/18

Holiday: No Training

Monday 10/21

Scorecard and Weekly Prep

Wednesday 10/23

Role Play

Friday 10/25

How to Build a Practice: Chapter 5

Monday 10/28

Scorecard and Weekly Prep

Wednesday 10/30

Role Play

Friday 11/1

How to Build a Practice: Chapter 6

NOVEMBER

Monday 10/28	Wednesday 10/30	Friday 11/1
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 6
Monday 11/4	Wednesday 11/6	Friday 11/8
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 6
Monday 11/11	Wednesday 11/13	Friday 11/15
Holiday: No Training	Role Play	How to Build a Practice: Chapter 7
Monday 11/18	Wednesday 11/20	Friday 11/22
Scorecard and Weekly Prep	Role Play	How to Build a Practice: Chapter 7
Monday 11/25	Wednesday 11/27	Friday 11/29
Scorecard and Weekly Prep	Holiday: No Training	Holiday: No Training

DECEMBER

Monday 12/2

Scorecard and Weekly Prep

Wednesday 12/4

Role Play

Friday 12/6

How to Build a Practice: Chapter 8

Monday 12/9

Scorecard and Weekly Prep

Wednesday 12/11

Role Play

Friday 12/13

How to Build a Practice: Chapter 8

Monday 12/16

Scorecard and Weekly Prep

Wednesday 12/18

Year End Planning

Friday 12/20

Year End Planning

Monday 12/23

Holiday: No Training

Wednesday 12/25

Holiday: No Training

Friday 12/27

Holiday: No Training

Monday 12/30

Holiday: No Training

Wednesday 1/1

Holiday: No Training

Friday 1/3

Holiday: No Training