



# ADVISOR TRACK OVERVIEW

1

## ASSOCIATE

**Development:** Checkpoints

**Licensing and Registrations:** Series 7, 66, Life/Health

**Responsibilities:** Client Acquisition

**Sources of Income:** Personal Production

3

## ASSOCIATE PARTNER

**Years in Position:** 10+ years and Senate

**Development:** PRG/Platinum Study Group

**Licensing and Registrations:** CFP® and ChFC®

**Responsibilities:** Client Acquisition/Joint Work/Team Leader

**Sources of Income:** BDA, Joint Work, and Personal Production

**Additional Benefits:** GEBA, Long-term Disability

2

## SENIOR ADVISOR

**Years in Position:** 5+ years and Senate

**Development:** PRG/Gold Study Group

**Licensing and Registrations:** CFP®

**Responsibilities:** Client Acquisition/Joint Work

**Sources of Income:** BDA, Joint Work, and Personal Production

**Additional Benefits:** NQDC

4

## SENIOR PARTNER

**Years in Position:** 3+ years as Associate Partner

**Development:** PRG/Platinum Study Group

**Licensing and Registrations:** CFP® and ChFC®

**Responsibilities:** Client Acquisition/Joint Work/Team Leader

**Sources of Income:** BDA, Joint Work, Personal Production, Potential Distributions

**Additional Benefits:** Equity Partner

For financial professional use only. Not for use with the public. This material may not be reproduced in any form where it is accessible to the general public.

900 Prides Crossing, Newark, DE 19713 P: 302.366.0366 | 200 E. State Street, Suite 303, Media, PA 19063 P: 610.565.9550  
Securities and advisory services offered through Cetera Advisor Networks LLC, member FINRA/SIPC, a broker/dealer and Registered Investment Adviser. Cetera is under separate ownership from any other named entity.