



ADVISOR TRACK OVERVIEW

1

ASSOCIATE

Development: Checkpoints

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

Responsibilities: Client Acquisition

Sources of Income: Personal Production

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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

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