

TEAM LEADERSHIP TRACK OVERVIEW



1 MENTOR

Unit Size: 1

Years in Position: 1

Development: Crossroads/Foundations

Licensing and Registrations: Series 7, 66, Life/Health, Enrolled in CFP®

Responsibilities: Joint Work

Sources of Income: Personal Production, Joint Work

3 MANAGING DIRECTOR

Unit Size: 6-10 AFP Advisors + Field Director(s)

Years in Position: 5+ years

Development: Legacy Leaders, Study Group

Licensing and Registrations: Series 24, CFP®, ChFC®

Responsibilities: Recruiting, Training, Supervision and Compliance

Sources of Income: Salary, Overrides, Joint Work, Personal Production and Incentive Compensation

2

FIELD DIRECTOR

Unit Size: 1-5 AFP Advisors

Years in Position: 3

Development: Leaders Building Leaders

Licensing and Registrations: CFP®

Responsibilities: Recruiting, Training, Supervision and Joint Work

Sources of Income: Salary, Overrides, Joint Work, Personal Production

4

SENIOR PARTNER

Unit Size: Developed 5 Senate Producers

Years in Position: 10+ years as Silver(+), FD/MD for 3 years

Development: Legacy Leaders, Study Group, Vistage

Responsibilities: Recruiting, Training, Supervision, Compliance and Operations

Sources of Income: Salary, Overrides, Personal Production, Incentive Compensation and 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 | 124 E. State Street, 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.