



**DIAMOND STATE**  
FINANCIAL GROUP

# ADVISOR TRACK OVERVIEW

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## ASSOCIATE

**Development:** Checkpoints/Securian

**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

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## 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

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## 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