



ADVISOR TRACK OVERVIEW

1 ASSOCIATE

Development: Apprenticeship, Residency Program

Licensing and Registrations: Series 7, Series 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® or ChFC®

Responsibilities: Client Acquisition, Firm and Market Leader, Gold Level Personal Production, Firm Committee

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

Additional Benefits: GEBA, Long-term Disability, Car, Tech & Benefit Allowance

2 SENIOR ASSOCIATE

Years in Position: 5+ years and Senate

Development: PRG, Gold Study Group

Licensing and Registrations: CFP® or ChFC®

Responsibilities: Client Acquisition, Market Leader

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

Additional Benefits: Tech & Benefit Allowance

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, Firm and Market Leader, Firm Committee, Community Board Representation, Platinum Level Production

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

Additional Benefits: Equity Partner