



# ADVISOR TRACK OVERVIEW

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## **ASSOCIATE**

**Development:** Apprenticeship, Residency Program

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

Health

Responsibilities: Client Acquisition

**Sources of Income:** Personal Production



#### **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

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### **SENIOR ASSOCIATE**

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

**Development:** PRG, Gold Study Group

Licensing and Registrations:  $\mathsf{CFP}^{\texttt{@}}$  or  $\mathsf{ChFC}^{\texttt{@}}$ 

**Responsibilities:** Client Acquisition, Market Leader

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

Additional Benefits: Tech & Benefit Allowance



#### 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

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