

TEAM LEADERSHIP TRACK **OVERVIEW**



MENTOR

Unit Size: 1

Years in Position: 1

Development: Crossroads, Foundations

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

Health, Enrolled in CFP^o

Responsibilities: Joint Work, Club-Level Personal

Production, Prospecting

Sources of Income: Personal Production, Joint Work

DIRECTOR

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

Years in Position: 5+ years

Development: Legacy Leaders, Study Group

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

Responsibilities: Recruiting, Training, Supervision and Compliance, Gold Level Personal Production,

Prospecting, Firm Committee

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



MANAGER

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, Club-Level Production, Prospecting

Sources of Income: Salary, Overrides, Joint Work,

Personal Production



SENIOR PARTNER

Unit Size: Developed 5 Senate Producers

Years in Position: 10+ years as Silver(+), M/D for 3 years

Development: Legacy Leaders, Study Group, Vistage

Responsibilities: Recruiting, Training, Supervision, Compliance and Operations, Firm Committee, Community Board Representation, Platinum Level Production

Sources of Income: Salary, Overrides, Personal Production,

Incentive Compensation and Distributions

Additional Benefits: Equity Partner

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