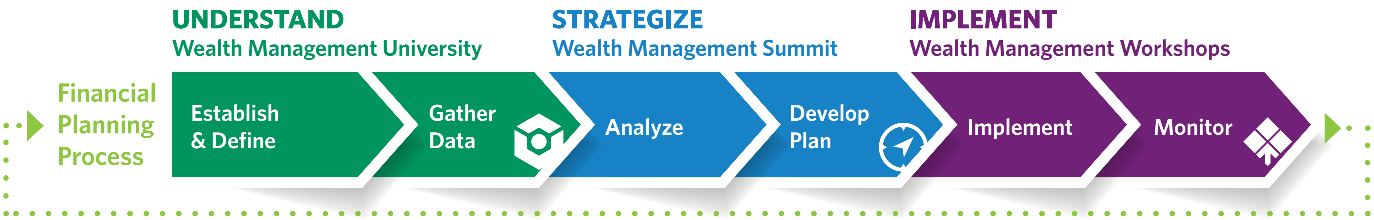
ARE YOU POSITIONED TO EVOLVE WITH THE FINANCIAL SERVICES INDUSTRY?

Our comprehensive Wealth Management Education platform helps you refine your skills, engage with clients, and dramatically grow your business. Consisting of three series that can be taken separately or together in any order, our platform is modeled on how you work with clients—by understanding needs, developing strategies to address those needs, and implementing a course of action.



WEALTH MANAGEMENT UNIVERSITY

Focuses on working with affluent clients and growing your practice. Featuring coursework from Cannon Financial Institute, tracks include a Certified Wealth Strategist® or Certified Retirement Counselor® designation, and three advanced Masters paths.

4 Sessions Annually

WEALTH MANAGEMENT SUMMIT

Identifies investment strategies that address the needs of affluent investors, such as tax-loss harvesting, insurance, and retirement income, and provides business planning and practice management resources.

1 Annual Meeting

WEALTH MANAGEMENT WORKSHOPS

Pinpoints the investment products and technology tools that will help you implement your strategy. Peer-based discussions with local advisors reveal best practices and personal experiences.

4-6 Sessions Annually

PARTICIPANTS IN WEALTH MANAGEMENT UNIVERSITY ACHIEVE SIGNIFICANTLY HIGHER GROWTH RATES

UP TO 14%
average attendee outperformance of peers who did not attend*

8%
average attendee growth between 2008-2009

vs.

6%
average industry growth between 2008-2009

*Among those advisors who attended the university from 2007-2010 as compared to averages from the annual InvestmentNews/Moss Adams survey of independent advisors.

LEARN MORE

To learn more about this unique and comprehensive approach to wealth management education, read our **in-depth brochure**.