The start of a masterful career.

Through a combination of distance learning, apprenticeship with senior advisors and education sessions at the firm's international headquarters, the Advisor Mastery Program (AMP) offers a comprehensive education for the next generation of Raymond James financial advisors.

The program takes a holistic approach, incorporating training for both technical and sales skills, to fully position new advisors for success. In addition, AMP is designed to support long-term development, whether a candidate plans to be a standalone advisor or join an existing team. In all cases, participants will engage in formal mentorship with their managers to bring a real-world component to their education.

For more information or to apply, visit
ADVISORCHOICE.COM.

RAYMOND JAMES®

RAYMOND JAMES®

INTERNATIONAL HEADQUARTERS: THE RAYMOND JAMES FINANCIAL CENTER

880 CARILLON PARKWAY // ST. PETERSBURG, FL 33716 // 800.248.8863

RAYMONDJAMES.COM

NOT FOR CLIENT USE

EXPLORING THE ADVISOR MASTERY PROGRAM

This unique development program is designed to provide the training and support you need to prepare you for a successful career as a financial advisor.

RAYMOND JAMES®

ADVISORY MASTERY TIMELINE

The Advisor Mastery Program is focused on helping participants meet certain milestones and acquire necessary training and licenses. Throughout the process, they work closely with their mentors to continue building and refining their skills, and make three visits to our international headquarters.

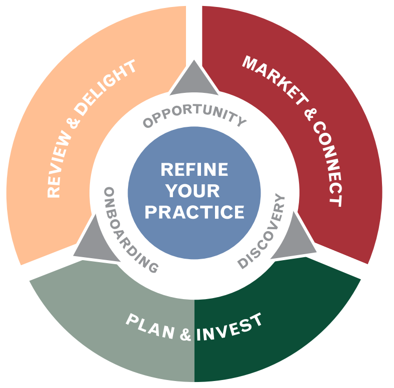
The Raymond James Practice Intelligence Model is designed to help advisors assess and refine their practices. The process helps identify strengths and weaknesses, create strategic plans and effectively serve clients. The Advisor Mastery Program is built around the model's four zones.

1 Market & Connect – Get the message out loud and clear. The Market & Connect zone offers tools and resources to help advisors identify and target their ideal client, articulate their unique brand and implement a customized, effective marketing plan.

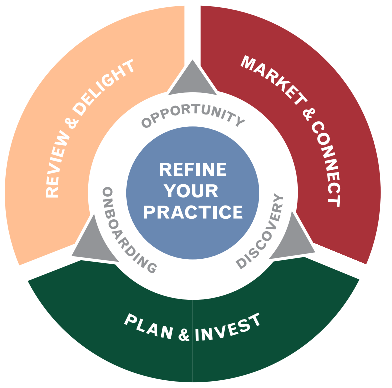
2 Plan & Invest – The Plan & Invest zone provides strategies for discovering key client objectives and developing appropriate investment strategies for an advisor's practice and their clients.

3 Review & Delight – Stand apart from the competition. The Review & Delight zone helps advisors develop an efficient review process and create a personalized service model that delights clients and turns them into the most effective, profitable advocates.

4 Refine Your Practice – The Refine Your Practice Zone helps advisors know where they stand and where they want to go. It encompasses resources for business planning, evaluating staff and key metrics to help determine the health and value of their practices.



HOME OFFICE VISIT 1



HOME OFFICE VISIT 2

HOME OFFICE VISIT 3

MONTHS 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18

Licensing | Distance Learning 101 | Coaching | Distance Learning 201 | Coaching | Distance Learning 301 | Customized Graduate Education

INTRODUCTORY PERIOD

MONTHS **0-6**

- Series 7 Licensing Prep/Exam
- Series 66 Licensing Prep/Exam
- Life, Health and VA Licensing Prep Exam
- Interactive Distance Learning Coursework
- Mentor Shadowing
- Raymond James Culture

FOUNDATIONAL PERIOD

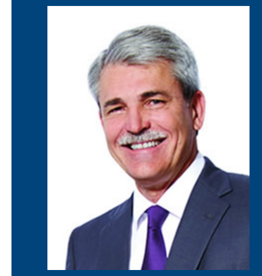
MONTHS **7-18**

- Advisory Sales Process
- Case Studies/Role Plays
- Client Referral/Introduction Process
- Develop an Effective Business Plan
- Developing Centers of Influence
- Estate Planning and Wealth Transfer
- Industry Recognized Designation
- Insurance Concepts and Application
- Marketing Approaches
- Mentor Shadowing
- Ongoing Client Support
- Product Solutions
- Prospecting Methods
- Retirement Planning for Individuals
- Social and Professional Networking

CUSTOMIZED GRADUATE EDUCATION

MONTHS **19→** ONWARDS

- Institute of Investment Management Consulting (IIMC) Certification
- Asset Management Services (AMS) Conference
- Certified Financial Planner (CFP®) optional with manager approval
- Raymond James Conference Attendance
- Retirement Plan Workshop
- Trust School
- Additional Designations



"This program is designed to provide a strong foundation to participants, helping them effectively establish their careers and providing the knowledge and resources they need to meet a full range of client needs."

PAUL REILLY
CEO, Raymond James Financial

"With the Advisor Mastery Program, our goal is to give promising participants all the tools and resources they need to meet and exceed clients' expectations and build lasting careers."

DAVID PATCHEN
Senior Vice President, PCG Education and Practice Management, Raymond James Financial

THE IDEAL AMP CANDIDATE...

...holds a bachelor's degree from an accredited four-year college or university.

...displays a comfortable, professional presence and confident point of view.

...demonstrates the motivation to learn and apply technical knowledge and skills related to successful financial planning.

...shows proven tenacity, work ethic and relationship-building skills.