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.
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.

### INTRODUCTORY PERIOD

<table>
<thead>
<tr>
<th>MONTHS</th>
<th>Series 7 Licensing Prep/Exam</th>
<th>Series 66 Licensing Prep/Exam</th>
<th>Life, Health and VA Licensing Prep Exam</th>
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<td>0-6</td>
<td>Interactive Distance Learning Coursework</td>
<td>Mentor Shadowing</td>
<td>Raymond James Culture</td>
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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.

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.

Foundational Period

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
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 and evaluating staff, as well as key metrics to help determine the health and value of their practices.

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
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.
“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

“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.”

PAUL REILLY
CEO, 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.