

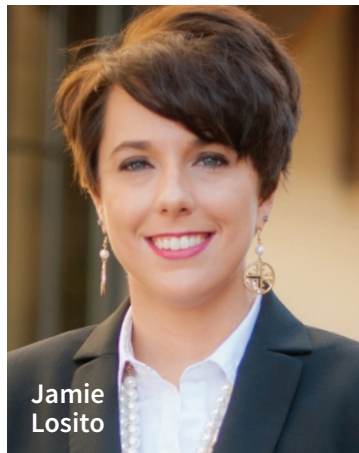
Sharing our vision

Women seeking a career as financial advisors have found great success through the Raymond James Advisor Mastery Program (AMP), which offers a holistic training program for new advisors. We spoke with four women who have been through the program about how it benefited them and their professional development.

Jamie Losito

Jamie Losito had always wanted to be in the financial services industry. Starting with the firm as a client service associate in December 2011, she moved into the role of financial advisor in February 2014.

“The AMP team touches on every aspect of the business,” Jamie said, “such as building processes for repeatable practices, asking difficult questions and responding to objections or criticism, taking care of yourself and handling the stress of the job.”



For other women, Jamie says now is the time to get into the industry.

“Go for it. Don’t hesitate. Lean in,” she said. “If it’s your dream, have confidence in it. There’s no reason there shouldn’t be just as many women in this industry as there are men. It’s time for the career to be encouraged among young women so they can begin building their networks early.”

Christine Vu

Christine Vu has always had an entrepreneurial spirit. With roots in technology, retail and then franchising, she created a successful frozen yogurt business spanning multiple states. When her business proved self-sustaining, Christine put forth her marketing and networking skills to work in financial services. She joined a training program at another noted financial planning firm, but quickly realized it wasn’t a good fit. She transitioned to Raymond James as a hybrid, stand-alone advisor, starting AMP in October 2016.



“Raymond James helped me understand what an advisor really is. At my first home office visit, AMP training wasn’t about the products, it was more about how you connect with the client to see if you are a good fit, how you relate to your clients and how you build long-term relationships. AMP is truly about building a career.”

The Pillars of AMP

AMP is a 24-month-long training program designed to engage new advisors, educate them, facilitate conversations in the classroom and in their branches with managers and mentors, and hold trainees accountable as they grow into their practice. While the curriculum is not excessively wide, it goes remarkably deep into the concepts of advising and growing a business, giving trainees the opportunity to excel in the fundamentals while allowing mentors and managers to mold the new advisors into potential successors. Those fundamentals are delivered in the form of the three pillars of the training program:

- 1. THE DEEP-DISCOVERY PROCESS**
Trainees are instructed how to ask clients and prospects the right questions to understand their needs, their gaps and their goals.
- 2. CO-CREATION OF A FINANCIAL PLAN**
Using Goal Planning & Monitoring (GPM) software, trainees are taught how to engage the client in creating a financial plan they can own and be active in.
- 3. THE THREE-MEETING PROCESS**
Trainees learn how to use a series of meetings (1. Connection, 2. Clarity, 3. Strategy) to build stronger client relationships built on mutual trust.

The best way to predict the future is to create it.

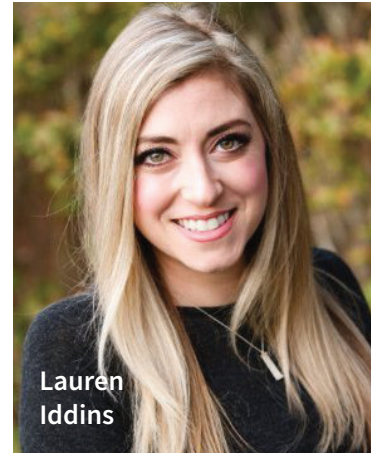
– PETER DRUCKER

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Lauren Iddins

Lauren Iddins was a marketing director at a law firm when she discovered her passion for initiating and maintaining relationships with clients. Having watched her father, a career-long Raymond James advisor, weather the economic storms in the wake of September 11 and again in 2008, Lauren was inspired to enter the industry by her dad's deep care for his clients.

"AMP was a game-changer for me," Lauren said. "I left for my first home office visit feeling apprehensive, especially that my non-finance educational background would put me at the bottom of the group. I could not have been more wrong. AMP encouraged us to embrace our individuality and helped us identify how to use that to our advantage. I returned home completely confident that I had enough new skills to make it in this profession."



Kelly Flores

Kelly Flores began her career in banking in 1987 and remained with Morgan Keegan as a registered sales assistant from 2001 until it was acquired by Raymond James. Kelly began in the Registered Associate Mentoring Program (RAMP) and knew AMP was the perfect solution for the next step in her career.

"Every challenge or hesitation I had about becoming a financial advisor has been solved through AMP," she said. "The program is first-rate, and the coaches are unbelievably experienced and dedicated to each participant. I truly believe that if an AMP participant will follow the program and the advice of the coaches, a successful career as a financial advisor at Raymond James will follow."



To learn more, visit AdvisorChoice.com.

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