Kick-Start Guide

These are the first steps in getting you to your "Z" position. This will be a guide to get you up and running as quickly as possible. You will also be working with our team throughout this process.
Items have links embedded for your convenience.

Week 1

	Sales	Operations	Marketing
Day 1	Retirement Seminar Part 1 • 1.01 Introduction • 1.01 Introduction "New"	Set training debrief and Licensing conversation for this week with Andy (Next two days)	
Day 2	Retirement Seminar Part 1 • 1.02 Medical Care in Retirement • 1.03 Long-Term Care • 1.04 Transfer on Death • 1.05 Longevity Risk • 1.05.1 Updated life expectancy tables	• Review Longevity 2.0 Videos (All 7) • Get access to BHFM training website (email sent) • Get access to Longevity Software (Email Sent)	
Day 3	Retirement Seminar Part 1 • 1.06 Taxable Classifications on Investments • 1.07 Inflation • 1.08 Investments in Retirement • 1.09 Financial Advisors • 1.10 Private Pensions	• Schedule a Zoom call with Andy to walk through software program (have existing client in mind to build plan for) • Get access to Financial Planning Data form to use as fact finder	Schedule Call with Ben to start A-Z plan
Day 4	Review training video: Make Money Now with Longevity. Retirement Seminar Part 2 • 2.01 Maximizing Social Security Benefits • 2.02 Income Stream in retirement2.03 • Income Stream in Retirement (continued) • 2.04 Running out of Money • 2.05 Income planning • 2.06 Market Losses		Send Ben an email with all the marketing you have attempted/done in the past and your current marketing efforts.

Week 1 (continued)

	Sales	Operations	Marketing
Day 5	Retirement Seminar Part 2 • 2.07 Case Studies Part 1 • 2.08 Case Studies Part 2 • 2.09 Case Studies Part 3 • 2.10 Case Studies Part 4 • 2.11 Summary "New"		

Weeks 2 - 4

	Sales	Operations	Marketing
Week 2	First Client Meeting (All 20 lessons) First Client Meeting Snippets (All lessons)	• Longevity meeting with Andy • Schedule LinkedIn meeting with Andy	• Hold A-Z plan meeting with Ben • Review Educational Workshop Overview and download Workshop checklist. • Build list of Schools & begin outreach for availability.
Week 3	Retirement Seminar Part 1 (All Lessons) Retirement Seminar Part 2 (All Lessons)	• Meet with Andy & set up LinkedIn program in Linked Campaign Overview • Segment your Client base for Money Now reviews Leveraging the Money Now Campaign Overview • Review Sample Folder Training	• Firm up list of 3-4 locations. Send to Ben. He will reach out to the mail company to identify the ideal starting location(s). • Schedule location and dates for first 101 workshop with location and confirm with PowerMailers
Week 4	2nd Client Meeting (All Lessons)	• Review Pending Business report Training	• Daily – Run LinkedIn procedure • A-Z plan review with Ben • Begin outreach to clients for Longevity reviews • Download PowerPoint presentation for 101 and rebrand and send through compliance as needed

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Approximate time frames from initial inquiry (Week 1) to approval:

- RIAs with selling agreements: 2-3 weeks
- IARs joining FTA Wealth Managers: 4-6 weeks
- Non-registered: 4-6 weeks after they pass the Series 65 exam.
  - You will not need sponsorship to obtain the Series 65 license.
  - To obtain training materials for the Series 65 go here.

FTA Wealth Advisors

Training & Action Items	
Week 1	• Set training debrief and Licensing conversation for this week with Andy (Next two days) • If you are not registered to sell AUM. You must first get your license, then meet with Andy to get the process started. Go here to purchase your study materials.
Post Approval Week 1	• Review FTA Wealth Advisors Overview • Get set up on TD/Schwab • Meet with Gordon to discuss portfolio make up and investment strategies
Post Approval Week 2	• Learn about Setting up TD/Schwab Account • Review sales training on How to get clients to move to FTA • Meet with Mark Kukielski regarding how to sell AUM to prospects. • Meet with Scott on How to sell AUM, and/or how to have the conversation about transitioning your clients.
Post Approval Week 3	• Learn how to get client reporting • Meet with Mark Herman to review account set up and reporting

Kick-Start Guide

Here is a list of key people at BHFM. Feel free to reach out to any of our team members for help or questions.

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