EDUCATION FOR FINANCIAL ADVISORS AND THEIR TEAMS

The Exemplar Financial Network Enterprise is committed to providing high-quality, professional training and event functions for our advisors. Although we have an experienced team delivering many of the programs, we also include our strategic partners and home office experts to assist in bringing the latest and greatest in financial planning and investment services to our advisors to help them build their practice.

Enterprise Conferences

The Exemplar Financial Network Enterprise conducts two conferences for the advisors in our enterprise. These conferences are conducted in the Chicagoland area and are predominately attended by the advisors in the Mid West.

Our Spring Conference is held in downtown Chicago in May and serves as the annual compliance meeting for our advisors. This 3-day meeting is the cornerstone of our enterprise events and tends to draw over 75 advisors. We often feature not only our strategic partners but invite experts from the LPL home office to speak on topics in their area of expertise as well as product vendors that are used throughout the Enterprise. In addition to keynote and breakout topics, we also offer one-on-one technology tables featuring these LPL and product experts for advisors that are looking to expand their knowledge with a particular tool or software.

Our Fall Enterprise Conference is held in the Chicago suburbs and is similar in format to the Spring Conference but spans over a day and a half. This one features two prominent speakers delivering compelling economic and political commentaries and/or presentations on sales and marketing topics.

Both Enterprise conferences are a forum for keynotes addressing economic updates and successful sales and marketing strategies. Dynamic keynote speakers are acquired throughout the year and scheduled in advanced. Topics are based on the feedback of our Enterprise advisors as well as timely topics based on what is happening in the industry. The Enterprise Meetings also have Product Company Roundtables/Presentations where our strategic partners have the opportunity to present a brief presentation on their product, company or sales idea. This is a wonderful way to learn about products that advisors might not be as familiar with and learn specific strategies in which they could be used.

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Based on the feedback from our advisors, the greatest benefit of these two Enterprise conferences is the opportunity to connect with other advisors in the Enterprise and gain knowledge from each other in a non-competitive, familial atmosphere.

Financial Planning Boot Camp Programs

The Exemplar "Financial Planning Boot Camp" walks an advisor through the entire process from Conducting the No-Obligation Appointment, Conducting the Data Gathering Interview, Crafting a Financial Plan (using the ClientWorks and MoneyGuide Pro technology through LPL), Presenting and Delivering the Plan for Implementation, Conducting the Implementation Meeting, Conducting and Annual Review and Understanding the Life Insurance Sales Process. Dave Hubbard, Enterprise Director, conducts the Boot Camp programs in the Crystal Lake Enterprise Office. All Exemplar Financial Network representatives are invited to attend. We typically conduct two Boot Camps a year and for as little as 6 people and as many as 14 in each training. Additional Boot Camps are added in a calendar year if needed.

Focus Sessions

Throughout the year, the Exemplar Financial Network Enterprise schedules Focus Session meetings that will take place in our Westmont, Illinois office or a hotel in the area. These are one-day sessions that focus on a particular topic that will help advisors develop their practice. Each year, the Enterprise business development team delivers on topics like wealth management, marketing, working with business owners, incorporating insurance in your practice and tax planning.

Our Enterprise Office team facilitates these Focus Sessions along with the support of our strategic partners who have the expertise or experience on the specific topic.

Conference Calls and E-Learning

On the first and third Monday of every month, we have our wholesaler lunch meetings, which have now gone virtual and opened up to our entire enterprise. Wholesalers are scheduled in advance and have one hour in front of all our advisors that attend to discuss product and best practice ideas. Our monthly webinar series takes place on the 2nd Monday of each month featuring different topics in a webinar platform. The Economic Update Call on the 4th Monday of the month features Enterprise Director, Dave Hubbard, and offers insights on economic developments over the past month. We also have our quarterly All-Star Calls led by Terry Murphy, President of Total Clarity Wealth Management, on the first Monday of each quarter. Terry is joined by a few of our advisors to discuss a variety of topics where other advisors in the enterprise can call in and listen.