PDS
Producer Development Series

LIMRA Talent Solutions International

Producer Development Series

Introduction to Holistic, Total-Needs Financial Planning — 300 Stage

Holistic, Total-Needs Financial Planning, the third stage in the Producer Development Series, helps full-service advisors and highly experienced producers master the foundational knowledge and skills required to succeed at total needs-based selling in the high-net-worth market.

Participants who complete PDS 300 are able to:

- Master the essential skills of financial planning — Acquire and apply the quantitative and qualitative components of full financial planning, necessary to succeed in a high-net-worth market
- Take their professional practice to the next level — Develop effective techniques for managing practice priorities and generating sustainable growth, as full-service financial advisors
- Build skills in the business-owner market — Learn to create and present solutions for business owners that lead to sales; provide ongoing service that leads to more business; refine personal business-management expertise
- Earn the *Master Financial Advisor* (MFA) designation — Offered upon completion of all three PDS 300 courses

Target Audience:

- Appropriate for producers entering the business as full-service financial advisors
- Highly experienced producers making the transition from traditional agent to financial advisor
- Experienced producers wanting to penetrate the business insurance market
- Prerequisites — Producers should have access to and be registered to sell both investment and protection products; they should have an array of services, so they can design a full financial plan for their clients

Delivery Option:

- Facilitator-led classroom training — Three skills-development courses led by a LIMRA Certified Facilitator or LIMRA Certified Company Facilitator
- The 301 course is five days in length. Levels 302/303 span three days.

With a mastery of holistic needs-based selling and the foundational knowledge necessary to provide full-service individual and small-business financial planning, your producers will be able to manage their practices with high levels of success.

For more information visit our www.limra.com/mfa
or contact talentsolutionsinternational@limra.com

PDS is a 21st-century development series designed to provide the knowledge, skills, and tools needed for greater success at every step in a producer's career development.

The series provides your producers with a comprehensive, professional career- and progressive skill-development path that allows them to build their sales and marketing expertise, one step at a time, as they progress through their careers.

A performance improvement program, PDS leads the producer through two stages of critical skills development:

- 100 Stage — First year producers learn fundamental knowledge and skills needed during their first 12 months of business.
- 300 Stage — Experienced producers gain the knowledge and skills needed to successfully move into financial planning.

As producers gain experience, they have the opportunity to obtain two of LIMRA's internationally recognized designations:

Associate Financial Advisor (AFA)

Master Financial Advisor (MFA)

Producer Development Series
Introduction to Holistic Total-Needs Financial Planning — 300 Stage

PDS
Producer Development Series

CURRICULUM OVERVIEW

Course 301 — Financial Advisor Skills Training (FAST)

FAST teaches the fundamentals of advising clients in the world of total financial services. The course dissects the entire financial planning process and provides skills to advisors in key areas identifying and approaching prospects in the high-net-worth market and conducting an in-depth fact-finding interview.

Producers learn how to accurately match products with the needs of clients and motivate them to take action now. The course emphasizes sound ongoing service, creating long-term trust in relationships, and conducting business ethically and in compliance with any country's government regulations.

Course 302 — Improving Your Effectiveness as a Financial Advisor

Preparing advisors for future advancement, these sessions go beyond the fundamentals of *FAST* to broaden producers' knowledge and skills in key areas and to lead them through a process of self-evaluation that improves effectiveness. Delegates enhance their abilities to communicate, expand influence in the affluent markets, and manage stress. They develop skills in adding staff and delegating work to others as their business grows. In addition, they learn key practice-management skills for success, including time management, keeping client records, using new technology, and building a team of specialists.

Course 303 — Business Growth for the Financial Advisor

These sessions complete the 300 series by developing the producer's advanced financial-advisor skills in the business-owner markets. They prepare the advisor to work with business clientele by providing information on the environment and needs of business owners. Delegates are introduced to a special fact-finding tool for use with business clients that will capture key information and provide for the best analysis of needs.

Advisors develop skills in creating and presenting solutions for business owners that lead to sales and learn the importance of ongoing service to strengthen relationships that generate new business. They learn the effective use of financial seminars and gain experience in conducting successful sessions. Course 303 expands upon the Course 302 skills of delegating to staff and trains delegates to build a more effective staff. Preparing for the future, advisors are introduced to the subject of succession planning — for both themselves and their business-owner clients.

LL Global, Inc.®

LIMRA www.limra.com

LOMA www.loma.org

06876-0818 (50700-10-710-48505)