

LIMRA Talent Solutions International  
Associate Financial Advisor (AFA)  
Professional Financial Advisor (PFA)  
Master Financial Advisor (MFA)

**Producer Development Series (PDS) is a 21st-century, country-specific, progressive 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, progressive career and skill-development path. It further enables them to build their sales and marketing expertise, one step at a time, as they advance through their careers.

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

- 100 Stage — First year producers learn fundamental knowledge and skills needed during their first 12 months of business. Earn the prestigious **AFA** designation.
- 200 Stage — Second/third-year producers develop competencies to expand their client bases and sales with needs-based selling. Earn the prestigious **PFA** designation.
- 300 Stage — Experienced producers gain the knowledge and skills needed to successfully move into financial planning. Earn the prestigious **MFA** designation.

*As producers gain experience, they have the opportunity to obtain three of LIMRA's internationally recognized designations. They are entitled to display the designation letters they earn in all printed and electronic communications, including social media, emails, business cards, and stationery.*

LIMRA created the **AFA**, **PFA**, and **MFA** designations to provide a track for professional development and a benchmark for measuring and recognizing a financial advisor's (FAs) competence and performance. The candidate for each of these designations makes a personal commitment to growth and development as a knowledgeable, top-performing advisor.

**Participants who earn the FA designations are able to:**

- Associate Financial Advisor (AFA) — Master the fundamentals of selling; effectively manage their businesses; adopt a systematic, proven process to identify, target, and penetrate specific markets
- Professional Financial Advisor (PFA) — Acquire an advanced level of target marketing; create a professional business practice; and elevate personal and business relationships
- Master Financial Advisor (MFA) — Master the essential skills of financial planning; take their professional practices to the next level; and build skills in the business-owner market
- Earn the AFA, PFA, and/or MFA designation — Offered upon completion of the appropriate Professional Development Series courses

**Target Audience:**

- AFA — New and first year producers who want to make early sales; get off to a fast and productive start; and build a strong foundation of fundamental knowledge and skills to launch success in their first 12 months of business
- PFA — Experienced producers who want to expand their client bases and sales using needs-based selling or take the next step in moving from sales to market development; companies with a highly experienced distribution system may wish to start their field force with the 200 Stage
- MFA — Producers entering as full-service FAs and highly experienced producers making the transition from traditional agent to FA and/or wanting to penetrate the business insurance market

**Delivery Option:**

- Facilitator-led classroom training — Skills-development courses led by a LIMRA Certified Facilitator or LIMRA Certified Company Facilitator

*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 contact [talentsolutionsinternational@limra.com](mailto:talentsolutionsinternational@limra.com).

## Curriculum Overview

Learners earn a designation after completing 30 credits in each stage. Each course is worth 10 credits, based on the content and level of the curriculum. Learners earn credits as they complete the individual courses in each of the following three stages.

### ***Associate Financial Advisor (AFA) designation is conferred for PDS***

#### ***Stage One***

Three, three-day skills-development courses:

- PDS 101 — How to Sell in the New Financial Services Industry
- PDS 102 — How to Manage Your Business as a Producer
- PDS 103 — How to Target and Penetrate Markets

### ***Professional Financial Advisor (PFA) designation is conferred for PDS***

#### ***Stage Two***

Three, three-day skills-development courses:

- PDS 201 — Creating Clients: Moving From Sales to Market Development
- PDS 202 — Managing Your Business as a Professional
- PDS 203 — Building Relationships for Professional Growth

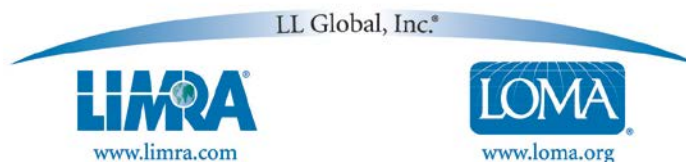
### ***Master Financial Advisor (MFA) designation is conferred for PDS***

#### ***Stage Three***

The 301 course is five days in length. Levels 302 and 303 are each three days:

- PDS 301 — Financial Advisor Skills Training
- PDS 302 — Improving Your Effectiveness as a Financial Advisor
- PDS 303 — Business Growth for the Financial Advisor

*In addition to completing the necessary coursework, LIMRA designees are required to be an active agent/manager to receive designation credit for a course. Corporate trainers who are not active practitioners are not eligible for designation credit.*



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