



2026 DISTRIBUTION AND MARKETING CONFERENCE

Agility in Action

**Empowering New Financial
Professionals: Building a High-
Impact Onboarding & Training
Experience**



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Successful Onboarding

- Successful onboarding leads to successful FP launch and impact on 2nd year retention
- No matter the model, thoughtful, strategic, onboarding sets new advisors up for success
- Today: Focus on the first 90 days understanding that onboarding is about the first year
- Share our experiences and invite you to comment and question
- Panel Presentation
 - Janice – Global view
 - Randy – Tree Top Level View
 - Megan – Integration View

Which distribution type best describes your distribution channel?

- A) GA Model
- B) Managerial Model
- C) Multi-line Model
- D) Other

Which best describes your new financial professionals early training?

- A) Locally conducted and developed content
- B) Locally conducted and centrally developed content
- C) Both locally and centrally conducted and developed
- D) Centrally conducted and developed content
- E) Wait...we're supposed to do onboarding training?

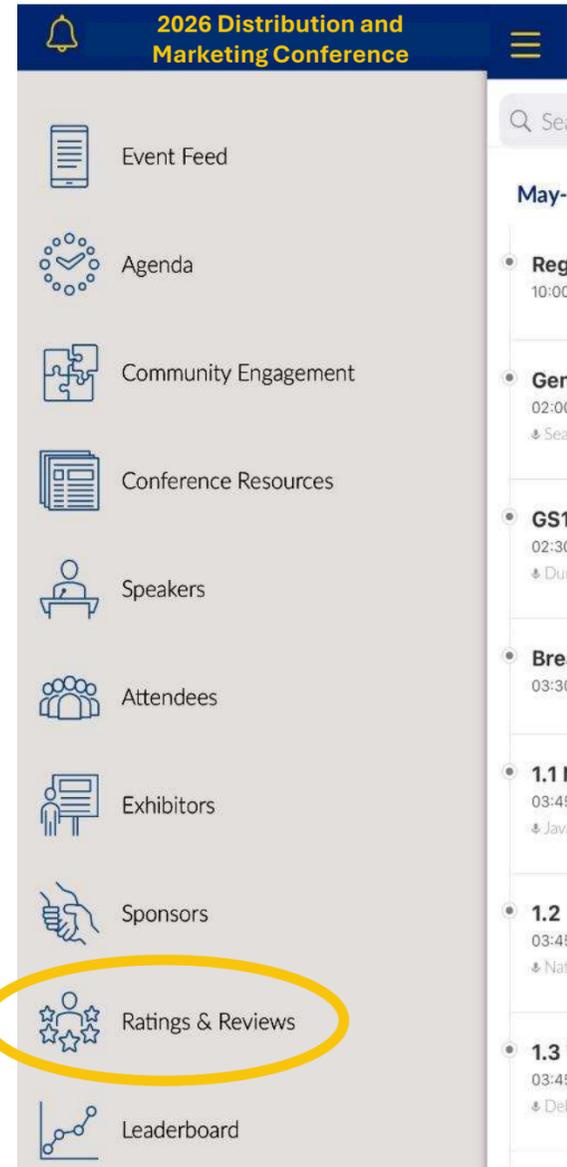
Polling Question

- What word or phrase best describes your company's onboarding of new Financial Professionals?
- *Input a word or short phrase that best describes your answer*

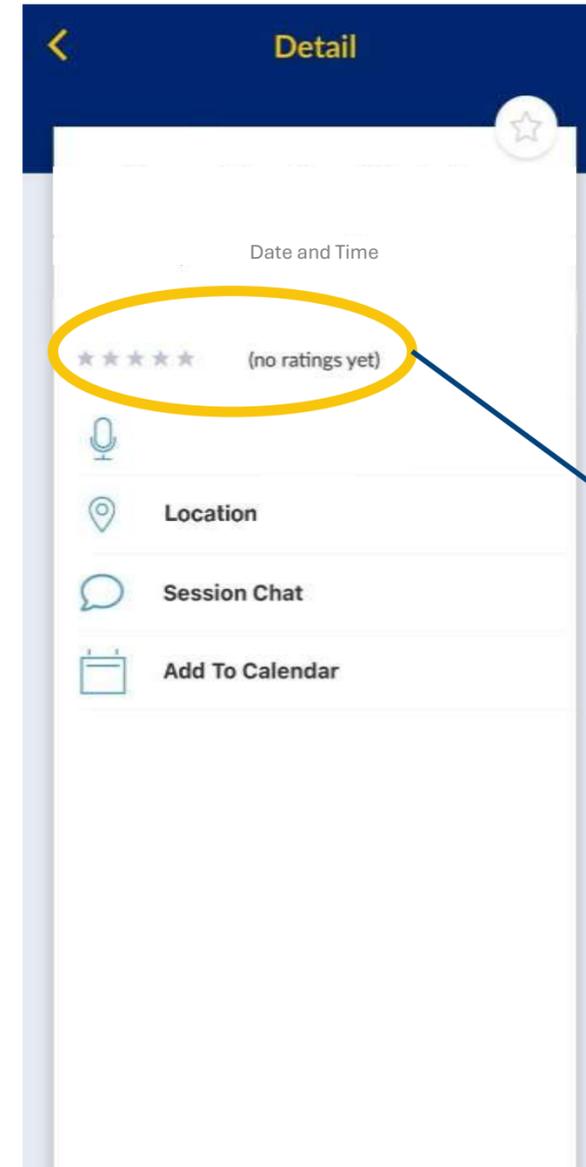
- What questions do you have?

We Value Your Feedback - Share It in the Conference App

Module Option



Agenda Option



Thank You



Navigate With Confidence

