Master Financial Advisor (MFA) Series

Transform Your Team's Potential

The MFA Series equips your sales team with professional competencies to build successful practices, master needs-based selling, advance skills in practice and relationship management, and transition to serving business clients, ensuring they thrive in today's competitive market and build lasting consumer trust.

COMPREHENSIVE SALES MASTERY

Empower your team to master the sales process from financial planning introductions through prospecting, identifying needs, and developing solutions, to closing and sustaining long-term relationships.

EXPERT PRACTICE MANAGEMENT

Enhance your team's skills in service, vision creation, recordkeeping, performance improvement, and business building.

BUSINESS CLIENT ACQUISITION

Equip your team with the knowledge and skills to win business clients, including fact-finding, risk management, and designing appropriate solutions.

PRESTIGIOUS DESIGNATION

Enable your team to apply for the internationally recognized Master Financial Advisor designation upon successfully completing MFA Levels 1 – 3.

The MFA Series is a flexible and streamlined rebuild of the Producer Development Series (PDS) 300 series. It includes 12 blended-learning modules across all 3 modules. Each module includes a half-day of facilitator-led learning and a half-day of prework.

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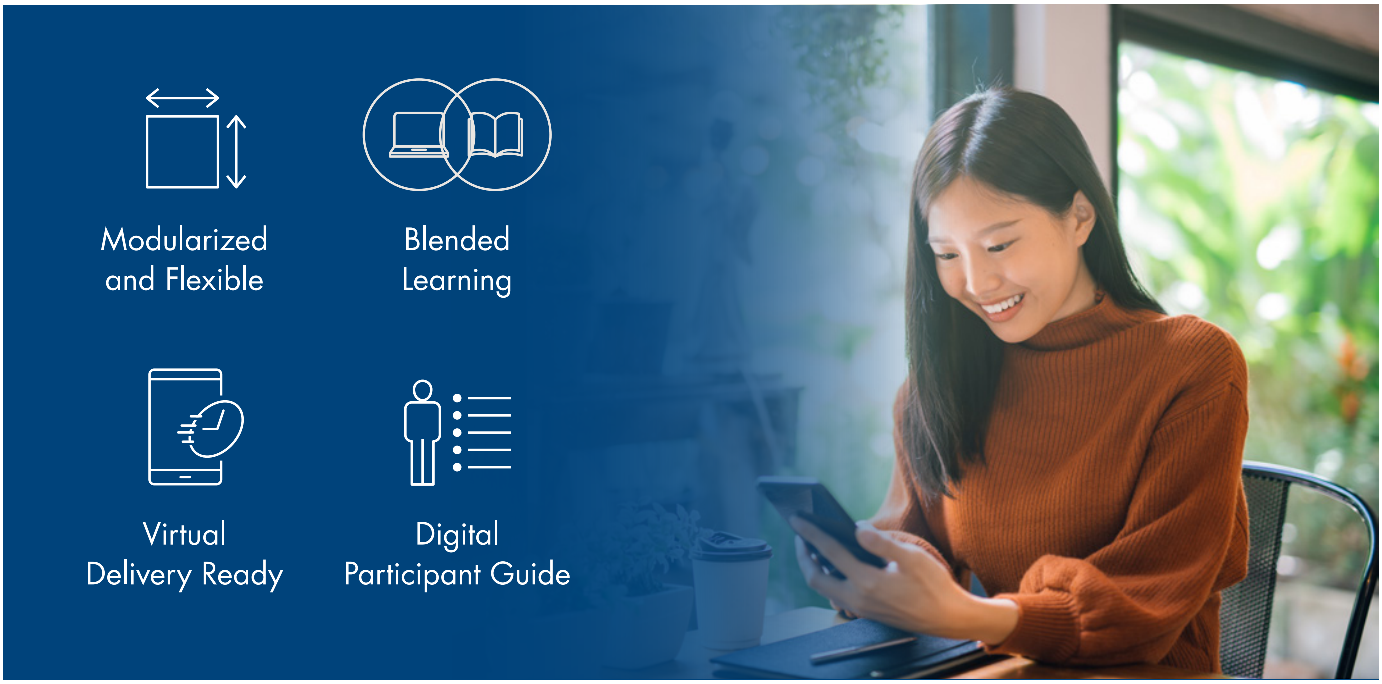

MFA LEVEL 1 — BUILDING A STRONG FOUNDATION

(6 Modules)

- Develop your team's professional competency and ability to build successful practices.
- Understand the financial advisor role, ethical practices, and the financial services environment.
- Master needs-based selling: identifying prospects' needs, quantifying them, developing solutions, and closing the business for long-term relationships.

MFA LEVEL 2 — PUTTING CLIENTS FIRST

(4 Modules)

- Prerequisite: Successful completion of MFA Level 1
- Advance your team's skills in practice and relationship management.
- Define a shared vision, implement performance improvement processes, and lead high-performing teams.

MFA LEVEL 3 — THE BUSINESS ADVISOR

(2 Modules)

- Prerequisite: Successful completion of MFA Levels 1 and 2
- Transition your team to serving business clients.
- Master fact-finding, risk evaluation, and developing solutions for business prospects.

Equip your team with unparalleled knowledge, skills, and the prestigious MFA designation to stand out in today's competitive marketplace. Learn more at www.limra.com/mfa or contact us at talentsolutionsinternational@limra.com.