Producer Development Series (PDS)

Holistic, Total-Needs Financial Planning

New and Developing Financial Advisors

11 Days

Facilitator-Led Classroom Training

Empower Your Advisors to Succeed in the High-Net-Worth Market

The Producer Development Series (PDS) is comprised of three courses designed to help full-service advisors master the essential skills of holistic, total-needs financial planning. This program enables financial professionals to effectively serve high-net-worth clients and business owners — while taking their practice to the next level.

Participants who complete PDS courses will:

Master the essential skills of financial planning (PDS 301):
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 (PDS 302):
Develop effective techniques for managing practice priorities and generating sustainable growth as full-service financial advisors.

Build skills in the business-owner market (PDS 303):
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.

Master Financial Advisor (MFA) designation:

Upon completion of all three PDS courses, participants will gain LIMRA's Master Financial Advisor (MFA) designation.

For more information visit limra.com/PDS
or contact TalentSolutionsInternational@limra.com

Curriculum Overview

PDS 301 — FINANCIAL ADVISOR SKILLS TRAINING

(5 days)

- Provides a comprehensive foundation in advising clients in the world of total financial services.
- Dissects the entire financial planning process and equips advisors with the essential skills of identifying and approaching prospects in the high-net-worth market and conducting thorough fact-finding interviews.
- Instructs how to align products with clients' needs and motivate them to take immediate action.
- Emphasizes sound ongoing service, creating long-term trust in relationships, and conducting business ethically and in compliance with any country's government regulations.

PDS 302 — IMPROVING YOUR EFFECTIVENESS AS A FINANCIAL ADVISOR

(3 days)

- Prepares advisors for future advancement and broadens their knowledge and skills in key areas.
- Leads attendees through a process of self-evaluation that improves effectiveness, enhancing their abilities to communicate, expand influence in the affluent markets, and manage stress.
- Assists in developing skills to add staff and delegate work to others as business grows.
- Supports the cultivation of key practice-management skills for success, including time management, keeping client records, using new technology, and building a team of specialists.

PDS 303 — BUSINESS GROWTH FOR THE FINANCIAL ADVISOR

(3 days)

- Fosters the advisor's advanced financial-advisor skills in the business-owner markets.
- Prepares the advisor to work with business clientele by providing information on the environment and needs of business owners.
- Introduces a special fact-finding tool for use with business clients that will capture key information and provide for the best needs analysis.
- Enhances skills in creating and presenting solutions for business owners that lead to sales.
- Demonstrates the importance of ongoing service to strengthen relationships that generate new business.
- Presents the effective use of financial seminars and gaining experience in conducting successful sessions.
- Expands upon PDS 302 skills of delegating to staff and trains delegates to build a more effective staff.
- Introduces succession planning for both themselves and their business-owner clients.

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