ADVISOR INSTITUTE
CORE SKILLS PROGRAM

UPGRADE YOUR PROSPECTING AND SALES SKILLS. TAKE YOUR CAREER TO THE NEXT LEVEL.

In this program, you'll learn:

- Industry-leading methods from prospecting through closing the deal
- How to perfect your personal sales approach to grow your business
- Techniques and tips for creating stronger client experiences
- Best ways to service clients that lead to repeat business and referrals
- Networking skills to help build your own peer support group

KEY PROGRAM DATES

Choose a start date that works for you.

1. Enroll By: December 31
   Start: Week of January 17
2. Enroll By: March 11
   Start: Week of March 28
3. Enroll By: June 03
   Start: Week of June 20
4. Enroll By: August 12
   Start: Week of August 29
5. Enroll By: September 30
   Start: Week of October 17

"The Advisor Institute provided valuable insights that have helped me conduct my client meetings more successfully. The ability to practice with peers and receive constructive feedback added a boost of confidence to my approach with real-world clients."

NIKKI YOUNG
Northwest Financial Advisors
2020 Program Participant

TYPICAL PARTICIPANTS:

- Newer-to-the-industry advisors
- Established advisors looking to hone their skills
- Non-licensed personnel
- Willing to commit four hours to pre- and post-class work, including live webinars, reading, quizzes and projects per week

SKILLS COVERED:

- Marketing and prospecting
- Positioning your personal brand
- Developing a service strategy
- Institutional sales training (financial institutions only)
- See syllabus for details

PROGRAM DETAILS:

- Duration: 18 weeks
- Weekly: Two 90-minute webinars and one 30-minute mastermind group call
- All classes conducted virtually
- See syllabus for details

PRICING:

- $7,500
- Flexible payment options deducted from commissions
- Financial assistance programs to help reduce upfront costs (independent advisors only)

WHAT'S INCLUDED:

- Instructor-led sessions
- Access to subject matter experts
- Materials and resources
- Earn up to 2 course credits towards your Financial Services Certified Professional® (FSCP®) designation through The American College of Financial Services®
- Bonus: 12-months access to phone skills and referral training from industry experts, Gail Goodman and Bill Cates
- Networking opportunities
- Virtual Symposium
- In-Person Conference*

ENROLL TODAY:

- Complete the agreement

ADVISOR INSTITUTE:

Provides proven training programs led by seasoned LPL instructors or trusted industry partners that expedite the development of newer-to-the-industry advisors—so they can get further, faster—and help their practice thrive.

CONNECT WITH US:

- Book an appointment for a one-on-one conversation
- Email the team at: AdvisorInstitute@lplfinancial.com
- Visit our Resource Center

*All inclusive, except airfare and dinner

LPL Financial