

# ADVISOR INSTITUTE

## CORE SKILLS SYLLABUS

### DESCRIPTION

This program teaches industry-proven methods for successfully identifying, selecting, and approaching prospects for financial products and services.

You will learn how to overcome the psychological barriers to prospecting and to set income and activity goals.

Strategic, tactical, and operational business planning processes are presented, along with effective contact management systems. In addition, practice management concepts, professionalism, and ethics are explored.

### MAJOR SKILLS COVERED

- Target marketing
- Prospecting methods
- Asking for referrals
- Approaching prospects
- Tracking prospecting activity
- Positioning your personal brand
- Creating awareness
- Prospecting through service
- Establishing goals
- Managing your time efficiently
- Professional practice management
- Responding to personality styles
- Building credibility and trust
- Conducting the discovery process
- Identifying and presenting solutions
- Discussing the implementation process

### LEARNING OBJECTIVES

Upon the completion of this program, you should be able to:

- Understand the psychology of the client acquisition process
- Identify target audiences using natural markets as a basis
- Select appropriate prospecting sources and methods
- Implement prestige-building and pre-approach activities
- Utilize effective approaches to set appointments
- Set goals and track progress using a prospecting system
- Service clients in ways that lead to repeat business and referrals
- Build and develop relationships to help impact long-term success

### MATERIALS

- Program workbook will be mailed to you prior to the start date.

### MEASUREMENT

- Quizzes: 33.33%
- Projects: 33.33%
- Participation (attendance and breakout question participation): 33.33%
- Final exam: Must score 70% or greater

### PROGRAM DETAILS:

- Duration: 18 weeks
- Weekly: Two 90-minute webinars and one study group
- Classes conducted virtually
- With successful completion of this program, you'll earn 2 course credits towards your [Financial Services Certified Professional® \(FSCP®\) designation](#) through The American College of Financial Services®
- For a complete list of weekly tasks, quizzes, and project deadlines, review the [program assignments](#)

### QUESTIONS:

- Email the team at: [AdvisorInstitute@lplfinancial.com](mailto:AdvisorInstitute@lplfinancial.com)