Financial Planning Residency

- **WHAT:**
  - A three-year <u>salaried position</u> during which the resident will learn how to deliver comprehensive financial planning advice while simultaneously attaining the industry's premier financial planning designation, the CFP®.

- **WHO:**
  - Individuals changing career paths or starting their careers. They should be passionate about serving others, ambitious to build a long career in the industry, and eager to work, learn, and grow.

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Financial Planning Residency

- **GOALS**:
  1. "Graduate" within three years after successful completion of both the CFP® exam and the three-year work-experience required to be a CFP® practitioner.
  2. Learn the industry and profession.
  3. Understand how to deliver an exceptional client experience, and how to operate and structure the teams that deliver it.
  4. Develop an appreciation and passion for client-centric financial planning.
  5. Obtain a long-term employment opportunity as a financial planner with a successful and growing financial planning firm (like Seven Springs Wealth Group!)

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Financial Planning Residency

- **BENEFITS:**
  - Salary, and bonus potential
  - Sponsorship in local Certificate in Financial Planning course
  - Sponsorship for CFP® exam and preparation
  - 401k with company match and profit sharing
  - Health Reimbursement Arrangement
  - Sponsorship for FPA local and national membership and enrollment in FPA externship

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Financial Planning Residency

Client Service Assistant (Year 1)

- **Learn the industry**
- **Develop expertise in industry-leading software, such as eMonday, BlackDiamond, RedTail CRM, Morningstar and others**
- Begin providing client service, back-office support and developing operational expertise
- Complete Certificate in Financial Planning course

Client Service Associate (Year 2)

- **Learn how to determine, develop and refine financial planning advice**
- Learn how to build financial plans; develop and oversee operational workflows; participate in client meetings, investment committee meetings and more
- Prepare for and take the CFP® Exam

Assistant Financial Planner (Year 3)

- **Develop the skills and tools needed to deliver financial planning advice to clients**
- Prepare for client meetings and present portions of prepared advisory material with Lead Financial Planner support
- Complete an FPA Externship

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