Advisor Basics School

Paraplanner Track – Course Summary

Home Page: https://www.advisorbasicsschool.com/

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I. Class Format

This course will have a new pre-recorded video lesson for each topic with pre-constructed outlines to use as notes. Each lesson will have additional documents available for you to download on the Advisor Basics School website to use as a personal reference or homework. Participation is necessary for achieving progress through this course.

II. Course Content

Being Valuable (2 Hours)

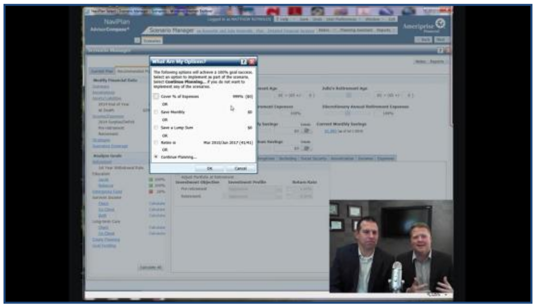
Description

- Multiple ideas on how to create value in your practice
- Multiple ways to bring value to clients
- Multiple GDC-producing ideas

<u>Additional Assignments</u>

Foundational Tasks

NaviPlan (4 Hours)



Description

- Net Worth
- Investments
- Cash Flow
- Strategies
- Insurance
- Goal Assumptions
- Scenario Manager
- User-Defined Text
- Client Reports
- Using a Tax Return
- Long-Term Care
- 5 Uses of Money
- NaviPlan Common Mistakes

Additional Assignments

Financial Planning and Advice

Morningstar (2 Hours)

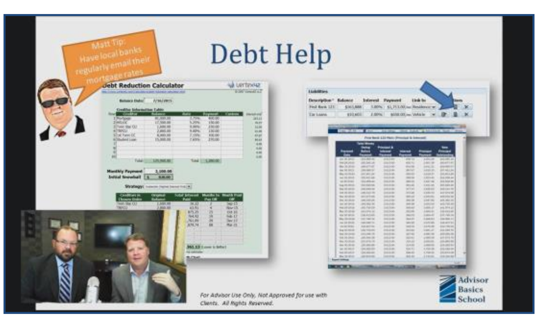
Description

- Setting up a client group in Morningstar
- Portfolio analysis
- Lists and searches in Morningstar
- Reading Morningstar investment detail reports
- Modern Portfolio Theory (MPT) & Capital Asset Pricing Model (CAPM)
- Reading an S&P stock report

Additional Assignments

Marketing and Client Acquisition

Preparing for Meetings (2 Hours)



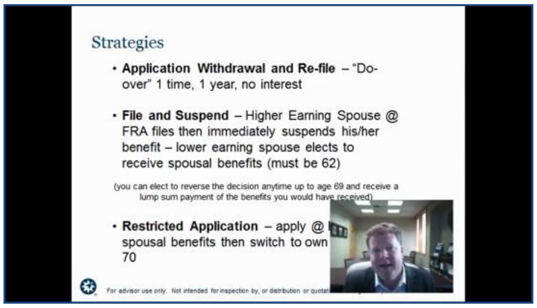
Description

- Identify the goals of meetings
- Examine the different possible areas to cover in client meetings
- Determine timely issues to advise clients
- Discover ways to learn each client's past, present, and future

Additional Assignments

Business Management – Business Processing

Social Security (2 Hours)



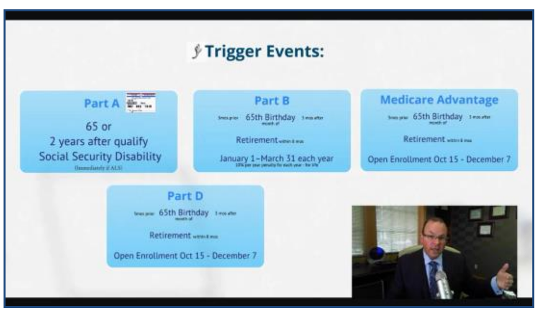
Description

- Identify the key information that advisors should understand about Social Security
- Learn to discuss with clients important details about Social Security benefit deadlines and programs
- Discover how to conduct single purpose meetings with clients to discuss applicable Social Security benefits and rules

Additional Assignments

Business Management – Meeting Preparation

Medicare (2 Hours)



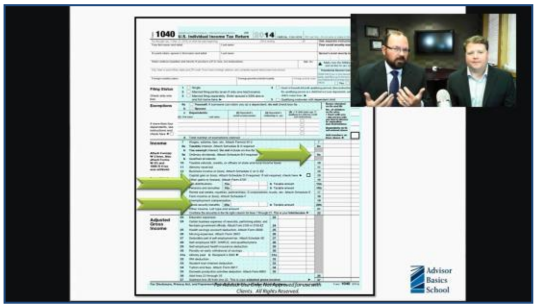
Description

- Differentiate between Traditional Medicare and Medicare Advantage
- Identify keys to help clients who are close to turning 65 and/or retiring with Medicare concerns
- Discover how to conduct client Medicare informational meetings containing information on Medicare basics, how it works, and significant decisions pertaining to retirement
- Describe an overview of Parts A, B, and D of Medicare

Additional Assignments

Business Management – Compliance Management

Reading a Tax Return (52 Minutes)



Description

- Discern valuable information about clients from their tax returns
- Comfortably and confidently communicate tax strategies with your clients

<u>Additional Assignments</u>

Business Management – Administration and Operations
Business Management – Records Retention and Filing

Career Advice (47 Minutes)

Description

- Examine the importance of networking
- Discover how to be successful in your career
- Learn proper manners for advisors
- Discover how to complete tasks at home office
- Examine what making the complex simple for clients looks like

<u>**Additional Assignments** (2-3 Hours)</u>

Product Solutions Learning Path
Watch "Managing the Generations"
Manners Videos

III. Recommended Readings

Cole, B. (2011). *How to win friends and influence people in the digital age*. New York: Simon & Schuster.