

***Successful sales and distribution teams are in front of the right financial professionals,
with the right message, at the right time.***

MMI has developed the Wholesaler Training Center (the Center) in conjunction with Wilke and Associates. The Center provides sales and distribution teams with a valuable training and coaching program to help external and internal wholesalers gain a competitive edge. It is a library of pre-taped training webinars approximately 20-30 minutes in length delivered by industry experts and top wholesalers. The Center offers Series 1.0: Core Courses with Series 2.0: Advanced Courses this fall.

The Top Five Benefits of The Center:

1. **Gain a Competitive Edge:** The Center arms a team with important financial intelligence and wealth management strategies for advisor communications in an ever-evolving world.
2. **A Dynamic Program Delivered by Industry Experts:** The Center has regular updates and new content delivered by top industry talent and wholesalers around analytics, technology, selling skills, and territory management.
3. **Turnkey Program for Managers:** Includes a rollout plan with kick-off call, monthly coaching call, progress reports, sales tips, and the Results Tracker Worksheet.
4. **7.0 hours of IMCA CIMA and CPWA CE credits** upon completion of the entire curriculum.
5. **Streamlined Access:** Access is for a full year and available 24/7 for training and coaching.

SERIES 1.0: CORE COURSES - The 19 webinars cover key information for every sales team.

SECTION I - FOUNDATIONS: This section provides current research and financial intelligence education webinars designed to help wholesalers better understand the advisor's needs and add value as a business partner. The webinars include what Barron's Top Advisors need from wholesalers, how advisors select wholesalers as their business partners, important Wealth Management and Robo Advisor trends and strategies to keep up your energy.

1. What Do Barron's Top Advisors Want from Wholesalers?

Sterling Shea hosts Barron's Top Advisor Summits, learning what they need to take their practices to the next level. In this webinar, he discusses what advisors seek from wholesalers and how they choose them as business partners, not just product providers. This session offers an opportunity to better understand how the Barron's Top Advisors run their businesses and how wholesalers can best position their value. Sterling will provide updates following different Barron's Advisor Summits.

Sterling Shea, Associate Publisher, Head of Advisory and Wealth Management Programs, Barron's

2. Views on Wholesaling

FUSE Research, a leading-edge decision support firm that has done extensive research with financial advisors, shares its latest findings and identifies the areas in which wholesalers can have the most significant impact with financial advisors. Topics include: advisors' preferred number of meetings with wholesalers, advisors' top future needs for which wholesalers can provide solutions, the most valuable information that wholesalers can deliver to advisors, the impact wholesalers can have on various areas of an advisor's practice, and areas for wholesaler improvement.

Patrick Newcomb, Director of BenchMark Research, FUSE Research Network

3. Becoming the Trusted Advisor to Trusted Advisors

How do you become a trusted advisor to your advisors? With office access becoming increasingly restricted and competition for the advisor's attention rising, it is critical for a wholesaler to be perceived as a value-added team member. Larry Sinsimer, who has worked with many advisors and sales teams, outlines five strategies for demonstrating value in every meeting and call, including ways of engaging the advisor, understanding what is important to him or her, and creating successful positioning and communications strategies.

Larry Sinsimer, Consultant and former Senior Vice President, Fidelity Advisor Solutions

4. Managing Your Energy for Maximum Performance

A wholesaler's job can be exhausting. To stay competitive, it is important to adopt the habits that successful wholesalers embrace to remain energized. Mike Lewers, an industry sales leader and former top wholesaler, helps you understand and embrace strategies that have enabled top wholesalers to stay on top of their game all day. The session includes the best ways to jumpstart the day, easy methods of re-charging at mid-day, and how to use single tasking, instead of multi-tasking, to maximize performance every day.

Michael H. Lewers, Managing Director, Head of Internal Coaching and Leadership Development, BlackRock

5. Wealth Management Trends

Trends in the Wealth Management arena are continually evolving, and wholesalers need to stay abreast of changes in the marketplace. This webinar shares current research that includes channel shifts, product flows, changing practices in the advisor marketplace, and other key data to help you keep pace with industry developments and bring the most relevant solutions to advisors.

Karen Lanzetta, Managing Director, Director of Market Research, Envestnet

6. Key Financial and Robo Advisor Trends to Engage Advisors

John Coyne shares key financial trends including the opportunities with Robo Advisors and helping advisors engage the next generation of clients. This information will better equip wholesalers to understand important areas of the advisor's business, have meaningful conversations to help advisors grow their practices, and position their value as a business partner and product provider. **John Coyne, Vice Chairman, Brinker Capital**

Section II: Territory: Territory Management and Segmentation Using Analytic Tools and Technology. This section provides strategies to streamline the sales process by setting criteria for target advisors, segmenting them using analytic tools, leveraging technology, a checklist to prepare for every meeting and call, and having a defined value proposition with high-impact services. Financial professionals like to work with wholesaling teams, structured similarly to how they run their own businesses, and the Power Partnerships webinar gives each team a framework to set them apart from the competition.

7. Create a Target Advisor Profile – Who is Your Best Advisor?

One of the biggest challenges facing wholesalers is that there are not enough hours in a day to cover all the advisors in a territory. It is important to create an "ideal advisor" profile to structure a targeted approach to finding advisors who can sell your product or solution. This webinar covers techniques and steps involved in creating an advisor profile.

Ami Tully, President, Maximum Impact Partners

8. Territory Organization Strategies using the ARMS Segmentation Analysis

Once you have a clear picture of the advisors most likely to sell your products, it is important to organize a territory through the segmentation of current clients and prospects. This webinar will help you set up or refine a territory and develop a successful coverage model. It takes 8-12 touches to win business, so it is important to have a focused territory management approach in working with key sales centers and targeted advisors.

Ami Tully, President, Maximum Impact Partners

9. Leveraging Analytics for External Sales Consultants

Frank Coates, a leader in developing industry analytic tools, identifies in this session the ways data and analytics can help answer three questions of vital importance to wholesalers:

Who should I invest my time with? What should I talk about? How do I present my solutions?

Among the tools and data sources he discusses are Focus Advisor Lists, Discovery Data, Market Metrics, Albridge Analytics, Web Tools, Zephyr, and Morningstar.

Frank Coates, CEO, Wheelhouse Analytics and Jeff Reiss, Senior Vice President, Head of Retail Sales, Hartford Funds

10. The Wholesaler's Prep Checklist – Be Prepared for Every Meeting or Call

It is important to be prepared for every meeting and call to demonstrate to advisors that you value their time and have done your homework on how your products or services fit their business models. Whether you are trying to be “hired” by a prospect or “promoted” by a current client, this checklist streamlines the sales process and helps position your team above the competition.

Maureen Wilke, President, Wilke and Associates, Inc. with Rob Shore, CEO, Wholesaler Masterminds

11. Building Your Value Proposition

Developing a Personal Value Proposition that lets management and financial advisors know why they should work with you is key to the sales process. While advisors, of course, need to know about your products, they say that what is important to them is a relationship with a strong wholesaling team that brings a high level of service and business value to their practices. In this session, you will learn how to develop the key points of your personal value proposition and the best ways to communicate it to clients and prospects.

Frank Coates, CEO, Wheelhouse Analytics and Ed Wallace, Relational Capital Management

12. Deliver High Impact Service to Advisors: Build a World Class Model

High Impact services set a wholesaling team apart and are important in differentiating a team's value. Don't assume advisors know the full range of services you offer. This webinar will outline specific high impact yet cost-effective services, including events and programs that advisors find valuable.

Russell M. Parker, President, rpmAUM

13. Power Partnerships: How Structured External and Internal Teamwork Strategies Drive Productivity and Results

It is critical that External and Internal wholesalers work hand in glove to gain access to today's busy advisors. Crafting a deliberate strategy about who does what to whom and when promotes advisor satisfaction and differentiates wholesaling teams. In this webinar, Mary Anne Doggett shares research and strategies for teamwork, including a partnership plan to systematize meetings, communication, and follow-up standards, leverage technology, and streamline advisor touch points.

Mary Anne Doggett, Managing Partner, Interactive Communications Inc.

SECTION III - Technology: Maximize Technology, Social Media and Tablet Presentations. This section features top industry sales leaders sharing strategies to connect with advisors through social media, ways to maximize your Tablet, channel knowledge, and a value-add strategy to show advisors how to gain referrals with LinkedIn.

14. Shorten the Sales Cycle by Leveraging Social Media

Using social media to uncover information about financial advisors can be daunting, so this session will focus on specific strategies that are timely and efficient. The presenters explore a LinkedIn tool that streamlines the way wholesalers find key advisor information. Strategies for Facebook, Twitter, and leveraging an advisor's website are also explored.

Laura Virili, Social Media Consultant, Speaker and Coach

15. Tablets for Wholesaler Productivity

The tablet has become a vital tool in wholesaling, whether you are using the iPad, Surface or another tablet, and J.P. Morgan wholesalers were among the leaders in implementing the tablet into the sales process. In this webinar, Joel Brookman discusses best practices for leveraging a tablet including internal communications, effective portfolio manager presentations for advisors, sharing marketing materials effectively, and strategies for one-on-one meetings. The session focuses on what works, what doesn't, and how to engage the advisor.

Joel Brookman, Director of Training and Bill Manegio, Executive Director, Client Advisor, J.P. Morgan

16. Effectively Working with Wirehouses

It is important to understand how to work effectively with wirehouses at the home office, complex, branch, and advisor levels. In this session, you will learn best practices for maximizing relationships at each level. Key strategies to build and deepen relationships and work together with home office specialists are covered. This module also provides a link to FundFire's series of articles on working with the individual wirehouses.

Steven Plump, Executive Vice President, PIMCO

17. Effectively Working with RIAs

In trying to reach the advisors who can use your solutions, you need to understand how RIAs work with a money manager's home office and wholesalers. In this webinar, Jay Hummel explores best practices for maximizing relationships with RIAs and securing business with the advisors most closely aligned to your product or service offering. Strategies to build and deepen relationships with gatekeepers and analysts are also covered. This module also provides a link to FundFire's series of articles on working with RIAs.

Jay Hummel, Senior Vice President, American Century Investments and formerly with Envestnet

18. Effectively Working with IBDs

In trying to reach the advisors who can use your solutions, it is important to understand how IBDs work with a money manager's home office and wholesalers. In this webinar, Matt McGinness explores best practices for maximizing relationships with IBDs and securing business with the advisors most closely aligned to your product or service offering. Strategies to build and deepen relationships with gatekeepers and analysts are also covered. This module also provides a link to FundFire's series of articles on working with IBDs.

Matthew McGinness, Managing Director, Strategic Consulting, Envestnet

19. Value-add Strategy – Show Advisors How to Gain Referrals with LinkedIn

This session will cover a referral strategy that wholesalers can bring to advisors – one that will add value to every conversation. Advisors say that referrals are critical to their business, so this webinar will provide the three steps wholesalers can use to show advisors how to identify one or two client referrals before every call or meeting. Maureen Wilke and Steve Dunlap will also share tips on using the LinkedIn Sales Navigator Tool.

Steve Dunlap, President and COO, FolioDynamix and Maureen Wilke, President, Wilke and Associates, Inc.