

## MMI Wholesaler Training Center Series 2.0 Syllabus

***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 two curriculums for sales teams, Series 1.0: Core Courses and Series 2.0: Advanced Courses.

### Syllabus for Series 2.0 Advanced Courses

#### Benefits of the Center:

- **Gain a Competitive Edge:** The Center arms a sales team with important financial intelligence and wealth management strategies for advisor communications in an ever-evolving world.
- **A Dynamic Program Delivered by Industry Experts:** The Center has regular updates and new content delivered by top industry talent and wholesalers around wealth management trends, analytics, technology, selling skills, and territory management.
- **Turnkey Program for Managers:** Includes a rollout plan, welcome email, kick-off call, progress reports, sales tips, and the Results Tracker Worksheet.
- **Streamlined Access:** Accessible for a full year and available 24/7 for training and coaching.

The Series 2.0 webinars help wholesalers facilitate more impactful conversations with financial advisors and their clients. The topics focus on portfolio construction, active and passive investing, connecting with business owners, delivering high-level services, showing advisors the right words to use with investors, and integrating virtual delivery.

- 1. Portfolio Construction: The Advisor View (Time: 22.57 minutes)**  
FUSE Research, a leading-edge decision support firm that has done extensive research with financial advisors, shares its latest findings on portfolio construction from an advisor's perspective. This webinar includes key talking points sales professionals can share with advisors around current trends in portfolio construction and the impact to their clients.  
**Patrick Newcomb, Director of BenchMark Research, FUSE Research Network**
- 2. Active and Passive: The Need for Both (Time: 25.31 minutes)**  
The challenge in today's market is helping advisors present the benefits of active and passive management solutions and really understanding how both investments respond in up and down markets. Russell Investments presents detailed research that sales professionals can share with advisors, as well as additional resources including a Blog for updates and other insights.  
**Todd LaFontaine, Consulting Director, Portfolio Consulting Group, Russell Investments**
- 3. Understanding the Life of a Business Owner (Time: 19.29 minutes)**  
Financial advisors work with business owners and many need advice for the different stages of a business, from the start-up of a company to the sale. This webinar shares research and strategies wholesalers can use with advisors to help them have impactful conversations with business owners by better understanding their mindset and personal commitment and provides guidance on delivering advice to them.  
**Tom Wilson, Managing Director, Wealth Advisory, Brinker Capital**

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- 4. Success Tips from Top Women Wholesalers (Time: 19.47minutes)**  
Successful wholesalers build strong relationships with their financial advisors. In this webinar, two top wholesalers share strategies and tips on how they transitioned from the internal desk to become top wholesalers. The session includes relationship strategies, territory management, and specific value-add ideas they bring to advisors to be memorable as a business partner.  
**Cheryl Nash, President, Fiserv Investment Services**  
**Susan Swink, JP Morgan**  
**Paula Melo Doroff, BlackRock**
- 5. The Keys to a Winning Advisor Service Model (Time: 30.47 minutes)**  
It is important in today's market to have a defined service model and execute on it. The top wholesalers on this panel share the services and communications they bring to advisors for a competitive edge. The strategies include time management, top advisor marketing plans, delivering high-impact advisor meetings and events, positioning the sales team, leveraging external and internal resources, and having defined services.  
**John Moninger, Managing Director, Retail Sales, Eaton Vance**  
**Brenda Warkow, Senior Vice President, PIMCO**  
**Paul Nicely, Regional Representative, Eaton Vance**
- 6. Driving Sales Virtually (Time: 17.23 minutes)**  
In today's market, sales teams need to leverage technology to create warm introductions for meetings and drive sales virtually. Financial advisors are inundated with phone calls, emails and wholesaler meetings. This webinar provides effective virtual communication strategies and tools to engage advisors, including smart email marketing, tracking email openings, delivering virtual meetings, a follow-up sequencing plan, engaging the gatekeeper, and using voice mails.  
**Jeff Lovanio, Intermediary Sales Development Manager, Voya**
- 7. Maximize Attending Conferences (Time: 33.56 minutes)**  
Conferences can be a significant expense for distribution teams and it is hard to measure the results. This webinar features industry leaders sharing strategies to maximize communications before, during, and after a conference. The strategies include best practices to use the conference app, ways to attract advisors to visit a booth, successful off-site events, an immediate follow-up plan, and a conference checklist for pre-planning and execution.  
**Maureen Wilke, President, Wilke and Associates**  
**Leslie Marshall, Head of Experiential Marketing, Morningstar, Inc.**  
**Bill Rader, National Sales Manager, American Century Investments**
- 8. The Power of the Right Words (Time: 19.37 minutes)**  
Sales professionals can help advisors use the right words with clients to have better conversations. Invesco Consulting teamed up with the political consultants and word specialists, Maslansky + Partners, to conduct one of the largest, most comprehensive studies of its kind on financial language. The research included measuring investors' emotional responses to words using unique instant dial-response technology and then a national survey with the goal to validate the findings. Sales professionals can use these word findings to help advisors understand the right and wrong words to use with investors.  
**Lisa Kueng, Director of Creative Campaigns, Invesco Consulting**