MONEY MANAGEMENT INSTITUTE

CONNECT KNOW GROW

Wholesaler Training Center

MMI Wholesaler Training Center: Series 1.0 Core Courses

Training and Education around Financial Intelligence, Territory Management, Technology, and Sales Systems

Foundations

- **What Do Barron's Top Advisors Want From Wholesalers?—*Sterling Shea,*** *Associate Publisher, Barron's*
- **Views on Wholesaling—*Patrick Newcomb*,** *Director of BenchMark Research, FUSE*
- **Becoming the Trusted Adviser to Trusted Advisers—*Larry Sinsimer,*** *Former Senior Vice President, Fidelity Advisor Solutions*
- **Managing Your Energy for Maximum Performance—*Michael H. Lewers*,** *Former Managing Director, BlackRock*
- **Wealth Management Trends—*Karen Lanzetta*,** *Managing Director, Envestnet*
- **Key Financial and Robo Advisor Trends to Engage Advisors—*John Coyne*,** *Former Vice Chairman, Brinker Capital*

Territory

- **Create a Target Advisor Profile—*Who is Your Best Advisor?*—*Ami Tully*,** *President, Maximum Impact Partners*
- **Territory Organization Strategies using the ARMS Segmentation Analysis—*Ami Tully*,** *President, Maximum Impact Partners*
- **Leveraging Analytics for External Sales Consultants—*Frank Coates*,** *CEO, Wheelhouse Analytics and* ***Jeff Reiss****, Senior Vice President, Hartford Funds*
- **The Wholesaler's Prep Checklist—Be Prepared for Every Meeting or Call—*Maureen Wilke*,** *President, Wilke and Associates, Inc. and* ***Rob Shore****, CEO, Wholesaler Masterminds*
- **Building Your Value Proposition—*Frank Coates*,** *CEO, Wheelhouse Analytics and* ***Ed Wallace****, Relational Capital Management*
- **Deliver High Impact Services: Build a World Class Model—*Russell Parker*,** *President, rpmAUM*
- **Power Partnerships: External and Internal Teamwork Strategies—*Mary Anne Doggett*,** *Managing Partner, Interactive Communications Inc.*

Technology

- **Shorten the Sales Cycle by Leveraging Social Media—*Laura Virili,*** *Social Media Consultant, Speaker and Coach*
- **Tablets for Wholesaler Productivity—*Joel Brookman*,** *Director of Training and* ***Bill Manegio****, Executive Director, J.P. Morgan*
- **Effectively Working with Wirehouses—*Steven Plump*,** *Executive Vice President, PIMCO*
- **Effectively Working with RIAs—*Jay Hummel*,** *Senior Vice President, American Century Investments*
- **Effectively Working with IBDs—*Matthew McGinness*,** *Managing Director, Strategic Consulting, Envestnet*
- **Value-add Strategy—Show Advisors How to Gain Referrals with LinkedIn—*Steve Dunlap*,** *President and COO, FolioDynamix and* ***Maureen Wilke****, President, Wilke and Associates*

Series 2.0 Webinar Series—Impactful Conversation Strategies for Advisors and their Clients

NOW AVAILABLE!

This series provides wholesalers with research and strategies for high-impact advisor engagement and their client conversations.

- **Portfolio Construction: The Advisor View**—This webinar presents a research overview on portfolio construction with talking points wholesalers can use during advisor conversations.
- **Active and Passive Management: The Case for Both**—This webinar focuses on the need for active and passive management and the benefits of a multi-asset approach. It will provide wholesalers with talking points for advisors that they can use in client conversations.
- **Understanding the Life of a Business Owner**—This webinar provides strategies that help advisors work with business owners to better understand their mindset and personal commitment, and guidance to deliver advice to them.
- **Success Tips from Top Women Wholesalers**—This webinar provides strategies and tips from two top women wholesalers on how they transitioned from internal wholesalers, structured successful territories, and added-value to advisors.
- **The Power of the Right Words**—This webinar provides the findings of significant research with focus groups on the best word choices advisors can use with investors and which are not effective.
- **The Keys to a Winning Advisor Service Model**—This webinar features top wholesalers sharing services and communications they bring to advisors for a competitive edge. This session includes tips for advisor business planning, client meetings, positioning a team, leveraging portfolio managers, delivering high impact services, and successful events.
- **Driving Sales Virtually**—This webinar provides effective virtual communication strategies to engage advisors and their clients including virtual joint meetings and calls, digital marketing, successful emails, gaining LinkedIn Connections, voice mail scripts, and the Last Look closing strategy.
- **Maximize Attending Conferences and Events**—This webinar features industry managers sharing best practices to maximize conferences. The webinar includes a checklist for pre-planning, event execution, advisor engagement, and a three-step follow-up plan.

MONEY MANAGEMENT INSTITUTE

CONNECT KNOW GROW

Wholesaler Training Center

Five key points about the Center:

1. Gain a Competitive Edge: The Center arms your sales team with important financial intelligence and wealth management strategies 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, coaching call, progress reports, sales tips, and the Results Tracker Worksheet.
4. Eligible for CE credits with I&WI CIMA® and CPWA® and Fi360 AIF®, AIFA® and PPC®: Upon completion of either or both Series 1.0 and Series 2.0 curricula.
5. Streamlined Access: Access is for a full year and available 24/7 for training and coaching.

Target Audience

- Distribution Teams—including external and internal wholesalers, national accounts and marketing
- Also beneficial for other internal groups that need to understand the wholesaling and distribution functions

Key Benefits

- Easy, on-demand access
- Reporting tools for sales managers and home office
- Timely coaching resource and tool for sales managers
- Highly cost-competitive
- Content continuously updated and new modules added

Program Features

- Course Selection—Each subscribing firm can elect to assign all of the webinars to its enrollees or select a sub-set to meet customized training needs.
- Certification—A completion certification option is available for firms that require their enrollees to complete all of the webinars within one year.
- CE Credits—Investments & Wealth Institute and Fi360 have accepted the Wholesaler Training Center for CE credit towards the I&WI CIMA® and CPWA and Fi360 AIF® , AIFA® and PPC® designations, respectively.
- Manager Support—Managers have access to the Center's reporting features to monitor their student's progress and completion. Supplemental online resources are also available to improve comprehension and to reinforce critical learning elements.

Comments from Participating Wholesalers

"I believe the Center succeeds in helping external and internal wholesalers take their business to the next level. It serves as a comprehensive learning center, providing diverse and meaningful content that sales teams can immediately apply to their territories."

—Senior External Wholesaler with 14 years of field experience

"The presenters were extremely knowledgeable and are well respected in the industry. The webinars will help to reinforce sales process strategy and serve as a training and development tool to advance wholesalers."

—Senior Internal Sales Desk Manager

Program Content

The Center webinars are updated routinely to reflect the changing industry. New content and resources will be added on an ongoing basis so that enrolled wholesalers can continue to hone their sales and business skills.

Pricing

Pricing for the Center is an annual subscription fee with individual purchases available directly on the site. Volume purchases at the enterprise level may also be invoiced. The fee structure is tiered based on the number of wholesalers enrolled.

Wilke

About Wilke and Associates

Maureen Wilke, President of Wilke and Associates, has partnered with MMI to develop the Center. She has delivered training to over 30 distribution firms and launched online learning centers for MMI member firms.

FOR MORE INFORMATION ON CUSTOMIZING A TRAINING SOLUTION AND SCHEDULING A DEMONSTRATION

learning@mminst.org

(646) 868-8500