

Continuous Learning Center

Wholesaler Training Curriculum

CENTER FOR 
Distribution Excellence
PRESENTED BY BY MONEY MANAGEMENT INSTITUTE



The Wholesaler Training Curriculum, the online education component of MMI's Center for Distribution Excellence, provides external and internal wholesalers with practical insights, best practices, and field-tested strategies from a who's who of industry distribution leaders and sales experts. Developed in collaboration with Wilke & Associates, the 29 modules comprise seven hours of core content and three hours of advanced content focused on high-impact advisor engagement and effective client conversations.

Designed to arm distribution professionals with financial intelligence and wealth management strategies to gain a competitive edge, the curriculum is updated regularly with content focused on analytics, technology, selling skills, and territory management. For firms that purchase bulk licenses, the program includes a rollout plan with kickoff call, coaching call, progress reports, sales tips, and a Results Tracker Worksheet.

SERIES 1.0—Core Courses That Cover Financial Intelligence, Territory Management, Technology, and Sales Systems

- WTC101** Welcome to MMI Wholesaler Training Curriculum
- WTC102** Foundations: What do Barron's Top Advisors Want from Wholesalers?
- WTC103** Foundations: Views on Wholesaling
- WTC104** Foundations: Becoming the Trusted Advisor to Trusted Advisors
- WTC105** Foundations: Managing Your Energy for Maximum Performance
- WTC106** Foundations: Wealth Management Trends
- WTC107** Foundations: Key Financial and Robo Advisor Trends to Engage Advisors
- WTC108** Territory: Create a Target Advisor Profile—Who is Your Best Advisor?
- WTC109** Territory: Territory Organization Strategies Using the ARMS Segmentation Analysis
- WTC110** Territory: Leveraging Analytics for External Sales Consultants

- WTC111** Territory: The Wholesaler's Prep Checklist—Be Prepared for Every Meeting or Call
- WTC112** Territory: Building Your Value Proposition
- WTC113** Territory: Deliver High Impact Service to Advisors—Build a World Class Model
- WTC114** Territory: Power Partnerships—How External and Internal Teamwork Strategies Drive Productivity and Results
- WTC115** Technology: Shorten the Sales Cycle by Leveraging Social Media
- WTC116** Technology: Tablets for Wholesaler Productivity
- WTC117** Technology: Effectively Working with Wirehouses
- WTC118** Technology: Effectively Working with RIAs
- WTC119** Technology: Effectively Working with IBDs
- WTC120** Technology: Value-add Strategy—Show Advisors How to Gain Referrals with LinkedIn



SERIES 2.0—Modules Focused on Research and Strategies for High-Impact Advisor Engagement and Effective Client Conversations

- WTC201** Welcome to MMI Wholesaler Training Curriculum
- WTC202** Portfolio Construction—The Advisor View
- WTC203** Active and Passive Management—The Best of Both Worlds
- WTC204** Understanding the Life of a Business Owner
- WTC205** Success Tips from Top Women Wholesalers
- WTC206** Keys to a Winning Advisor Service Model
- WTC207** Driving Sales Virtually
- WTC208** Maximize Attending Conferences
- WTC209** The Power of the Right Words

The Wholesaler Training Curriculum is ideal for:

- Internal and external wholesalers
- Key account teams
- National account teams
- Marketing representatives
- Service team associates
- Product teams

BENEFITS

- Content developed by subject matter experts
- Regularly updated to keep up with latest industry trends
- Turnkey solution for in-house L&D and training teams
- Provides training progression for employees and streamlines new employee onboarding
- Provides a competitive edge and differentiation
- Eligible for CE credits—Series 1.0: 7 hours for Investments & Wealth Institute® CIMA®, CPWA®, CIMC®, and RMA®;Fi360 AIF®, AIFA®, and PPC® Series 2.0: 3 hours for Investments & Wealth Institute® CIMA®, CPWA®, CIMC®, and RMA®Fi360 AIF®, AIFA®, and PPC®
- Streamlined on-demand access
- State-of-the-art learning management system powered by Kaplan SmartPros
- Mobile-friendly and accessible 24/7 to accommodate any schedule
- Reporting tools to monitor course progress
- Digital badges available upon course completion

MMI CENTER FOR DISTRIBUTION EXCELLENCE



The MMI Center for Distribution Excellence is a resource hub and community built by—and for—financial services distribution professionals. Created to discover, promote and enhance best practices, the Center offers a comprehensive suite of conferences, robust online resources and thought leadership, and educational courses. The Wholesaler

Training Curriculum is the online education component of the Center. Separate pricing applies to each. For more information about the Center, visit cde.mminst.org or email cde@mminst.org.

ABOUT WILKE AND ASSOCIATES



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

MMI CONTINUOUS LEARNING CENTER

The MMI Continuous Learning Center offers a structured, comprehensive education platform for all career stages of the investment professional. Available programs include Fundamentals of Investment Advisory Solutions, Sustainable Investing Curriculum, Wealth Management Essentials, Wholesaler Training Curriculum, and an Education Marketplace of third-party offerings. For more information or to schedule an online demonstration, contact us at **(646) 868-8500** or learning@mminst.org.