RAYMOND JAMES

Empowering new generations of women advisors

The Advisor Mastery Program (AMP) is committed to helping change the face of financial services through its recruitment and support of women advisors whose distinct traits and experiences help to improve the financial lives of their clients and make our firm stronger.

A 24-month training program, AMP is designed to engage new advisors, educate them, facilitate conversations in the classroom and their branches with managers and mentors, and hold trainees accountable as they grow into their practices. Learn how AMP helped these advisors who are members of the Raymond James Women Financial Advisors Network set up their careers for success.

ANN AUSTIN

Ann spent about 20 years as a sales assistant before deciding to become a financial advisor through AMP, where she received tremendous support in working toward her goals and building a practice.

The coaching provided through AMP was instrumental to Ann's success in becoming an advisor. Her coach taught her to take care of herself first, then worry about what she could control.

"My advice to prospective advisors – do your research and know what you're getting into, then go for it full force!"

ERIN BETHGE

Prior to 2014, Erin never thought she would become a financial advisor. However, when her father began looking for a successor for his practice, it became clear she was the right choice. Within a year, she began working with the training program at the firm where her father's practice resided, eventually transitioning to Raymond James and AMP.

"I can't say enough good things about AMP," Erin said. "It's about more than sales. They want advisors to truly find success."

After integrating seamlessly as a partner within her father's practice, Erin saw what was possible for women advisors to accomplish with the right support.

"Having so much flexibility is great," she said. "As a mother, I don't feel that I have to sacrifice my family life or my career. I can have both and enjoy them to the fullest."

LINDSEY DOSS

Lindsey grew up around the business, where her mother was a financial advisor for over three decades. Inspired to become an advisor after seeing the positive impact her mother had on clients, she wanted ownership of her business and full control of its growth, so she decided to join Raymond James through AMP.

“It was scary, but I took the leap and started over,” she said. “It’s hard to put into words what AMP has done for me. It was everything I was looking for.”

One of the biggest challenges Lindsey faced was public speaking, but AMP pushed her out of her comfort zone and helped her practice.

“I still get intimidated, but it’s not as bad anymore,” she said. “I’m not sure if I would have been able to move past that fear without the AMP experience.”

LESLIE ANN FISHER

A private banker for 12 years, Leslie wanted to become a financial advisor, but her manager would not allow her the professional growth she desired. After learning about Raymond James, she decided to transition and enroll in AMP. During this time, she realized that not only could she become a successful financial advisor, but she could also do so without taking away from her responsibilities to her family.

“Other programs were very time-consuming and not good for a single parent because they required travel and leaving family behind,” she said. “AMP home office visits were spaced out. I could also be [a] mom while taking classes.”

Perhaps the most surprising thing about AMP for Leslie was the focus on personal health and wellness.

“It changed the trajectory of my business going forward because personal well-being was made such a focus,” she said. “I love that and find it crucial.”

AMANDA SCHNEIDER

Amanda’s father was a financial advisor with almost 20 years of experience and wanted her to transition into that role. She joined AMP to establish her independent practice, putting up half the money for the program herself, and quickly realized that AMP wasn’t just about the numbers but how to connect with people.

Program leaders took Amanda seriously and put forth a genuine effort to get her in front of home office advisors, where she could connect with them and share their wisdom and experience.

“It was a risk for them to dedicate so much to these new advisors, but they took that leap anyway,” she said. “They’re here for us, and if you’re willing to be there for them, it can be a really beautiful partnership.”

THE PILLARS OF AMP

The AMP curriculum goes remarkably deep into the concepts of advising and growing a business, giving trainees the opportunity to excel in the fundamentals while allowing mentors and managers to identify and help shape potential successors.

1. DISCOVERY

Trainees are instructed how to ask clients and prospects the right questions to understand their needs, gaps and goals.

2. CREATING A FINANCIAL PLAN

Using Goal Planning & Monitoring software, trainees are taught how to engage the client in creating a financial plan they can own and be active in.

3. THE CLIENT EXPERIENCE PROCESS

Trainees learn how to use a series of meetings – connection, clarity, strategy – to build stronger client relationships based on mutual trust.

To learn more about AMP, visit **raymondjamesAMP.com**
or contact one of our AMP recruiters at **AMPrecruiting@raymondjames.com**.

RAYMOND JAMES®

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