GLADEOGRAPHIX PRESENTS

PEOPLE PERSON PERSUADER ORGANIZER



RESPONSIBILITIES



INVESTING

- ► Personal financial advisors assess the financial needs of individuals and help them with investments, tax laws, and insurance decisions.
- Advisors help clients plan for short-term and long-term goals, such as education expenses and retirement.



MARKETING

- Many personal financial advisors spend a lot of time marketing their services, and they meet potential clients by giving seminars or through business and social networking.
- **Networking** is the process of meeting and exchanging information with people, or groups of people, who have similar interests.



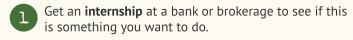
SALARY

STARTING SALARY \$32,3000

MID-CAREER SALARY \$67,5000



LANDING 1ST JOB



Apply to one of these different types of companies:

Training program with a large investment company: Such programs are competitive, but worth the work if you can get into them.

Smaller company: You might not go through the same structured training regimen, but you'll have opportunities for one-on-one mentoring and be able to broaden your knowledge by performing several different tasks for different clients.

Financial analyst position at a bank.

Have a plan of attack: Show the employer how you will find clients. Make it as detailed and realistic as possible.



EDUCATION



This is a client-based business. You are selling your services. So some clients require the right degrees or pedigrees.

Economics)

Accounting

Math

Business Management

Finance

Bachelor's Degree highly recommended. MBA recommended.



THINGS TO DO IN SCHOOL

Try to get an internship at a

INTERN

MOCK

PORTFOLIO

financial company or for an independent financial advisor.

Start your own mock portfolio with mock investments: Use Yahoo Finance or Market Watch.

RESEARCH

Read the trades and SEC info www.investor.gov | www.sec.gov

REWARDING ASPECTS

- ★ You can work as hard and as little as you want. You determine how much you want to make.
- Help people make money and create a financial plan for their future and family.



"In your interview - have a go-getting attitude, have a plan in place of how you're going to find your clients. Express with confidence and articulately why you're going to stand out. Accept rejection, create opportunities for yourself. If you want client's trust, prove yourself trustworthy."

To learn more about this career, visit



Designed by Danny Shin