

Webinar Series

Exceptional Teams

A FIRST TRUST & PARETO SYSTEMS COLLABORATION*

It is self-evident that the financial services sector is going through intense commoditization. Coupled with competition and compliance realities, new business models are evolving, and a franchise-ready mindset is emerging as an attractive model for advisors. This means that advisors can be proactively building something with enterprise value.

In this 5-Part Webinar series, supported by the Pareto Academy, you will work through a process to:

- Ensure that all team members are integrated successfully.
- Fully actualize the firm's vision and ensure team success.
- Determine if there is a philosophical fit and alignment of interests with a prospective advisor.
- Onboard a new advisor and their clients consistently and with predictable results.

WEBINAR SERIES

Session #1: Introduction to Teaming

Session #2: Team Integration

Session #3: Team Success

Session #4: Advisor Fit Process

Session #5: Advisor Onboard Process

HOSTED BY

Sherri Palle
Pareto Business Consultant



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Pareto Business Consultant

DURATION AND TIME COMMITMENT

Three-month series and approximately 2-3 hours per week for program study and implementation. Sessions are approximately two weeks apart.

**Speak to your First Trust wholesaler to register*

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