RAYMOND JAMES

Developing the next generation of veteran advisors

The Advisor Mastery Program (AMP) is committed to helping change the face of financial services through its recruitment and support of advisors whose traits and distinct experiences will add to the diversity of voices that make our firm stronger.

A 24-month training program, AMP is designed to engage new advisors, educate them, facilitate conversations in the classroom and in their branches with managers and mentors, and hold trainees accountable as they grow into their practices.

Learn how AMP helped four advisors who are military veterans set up their careers as financial advisors for success.

JARED SWEETSER, MBA, AAMS™
Financial Advisor

Having served 20 years as a US Navy Supply Corps Officer, Jared began his career with Raymond James through the Advisor Mastery Program (AMP).

"My military service proved valuable in several key ways as I transitioned into financial services. Those coming from the service bring a foundation of leadership, discipline and the ability to leverage available resources to successfully execute the mission. AMP does an exceptional job of creating the framework for a new advisor's success while exposing you to the many strategies needed to build a practice."

Jared emphasizes that while many advisors develop a niche, every client situation is unique. The breadth of resources available at Raymond James allows advisors to deliver tailored solutions, regardless of complexity.

"The depth of expertise across the firm is invaluable. Our home office specialists stand ready to support advisors, helping us create thoughtful, effective outcomes for both clients and prospects."

For Jared, his military background and the support structure of AMP continue to shape how he serves clients today.

"When I sit across the table from clients, they know I've dedicated a portion of my life to service above self. I carry that same philosophy into my practice. We have an entire team behind us committed to serving our clients with that same mindset. AMP helped me build the processes, introduce me to the resources I rely on daily and accelerate my development – allowing me to focus on leadership, apply discipline and deliver well-structured financial plans."

BOBBY GILLENWATER, MBA, AAMS®
Financial Advisor

After serving more than 20 years in the US Navy as an EOD technician, Bobby Gillenwater transitioned into financial advising with a passion for helping clients navigate complexity and move forward with clarity. His military experience shaped the foundation of his approach. “We had a saying: plan the dive, dive the plan,” he said. “It meant preparing for both the known and the unknown, and that mindset carries directly into how I guide clients today.”

Bobby enjoys helping clients cut through uncertainty and focus on what matters most. “It reminds me of clearing an area from Improvised Explosive Devices while deployed to Iraq – we’re helping people move forward safely toward their objective,” he said. He emphasizes building strong relationships through open communication and responsiveness and wants every client to walk away feeling a sense of relief knowing they have a clear plan and someone in their corner.

Outside of work, Bobby is grounded in his faith, his family and time spent coaching and competing in sports. He brings that same sense of purpose and service into his work, striving to make a meaningful impact in the lives of the clients and community he serves.

BROOKE M. HARRIS WETZORK, AAMS®
Financial Advisor

After a fulfilling and varied 28-year career in public service leadership, Brooke was ready to turn the page. She took a thoughtful approach to defining what her next chapter would look like, and what she discovered was that her future had been quietly taking shape all along.

For more than three decades, Brooke watched her husband, Bob, guide clients through meaningful financial decisions while building lifelong relationships. She saw firsthand the impact of trusted advice – and the difference it can make in people’s lives. At the same time, the growing influence of women in wealth and investing made her transition both timely and meaningful. Motivated by a desire to continue helping others, Brooke chose to pursue a new career as a financial advisor through AMP. Her decision is a powerful reflection that growth and learning truly have no expiration date.

DWIGHT G. EDWARDS, CRPS™, CRPC™, AIF®
Associate Vice President, Investments

As far back as high school, Dwight had an interest in the stock markets and the inner workings of financial investments. After serving five years in the USAF, Dwight returned to school and achieved a degree in finance and economics. Shortly after graduating, Dwight decided to join Raymond James initially in a home office role and wholesaling prior to becoming a financial advisor.

“There’s so much to learn at first,” he said. “One thing I can say for certain as an advisor who went through AMP is you can’t learn everything about every aspect of the business all at once, and – like in the military – you need to rely on a team comprised of different specialties to be your support network. Thanks to networks like AMP, not only can I receive help from those specialists, but I can also give that support to other advisors with my own skill set.”

As someone who has experienced the benefits of AMP and the Valor Network firsthand, Dwight is no stranger to paying forward.

“During my time at Raymond James, I’ve volunteered at charity events and other veteran support groups around the firm. One of the things I’ve found great satisfaction in is helping military veterans onboard as financial advisors because it’s a shared experience that not everyone gets or goes through.

“Being a veteran, I feel you owe it to yourself and to others who have served to help encourage and give guidance. The firm has a culture of sharing knowledge and helping others at different stages of their careers – for advisors and more broadly.”

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®

INTERNATIONAL HEADQUARTERS: THE RAYMOND JAMES FINANCIAL CENTER
880 CARILLON PARKWAY // ST. PETERSBURG, FL 33716 // 800.248.8863 // RAYMONDJAMES.COM