RAYMOND JAMES

Developing the next generation of Black 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 unique experiences will add to the inclusion 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 more about how AMP helped two Black advisors make crucial connections in field.

ELIJAH LARES, MBA, AAMS®
Financial Advisor

Before joining Raymond James, Elijah was seeking a firm where he could grow professionally, learn from experienced advisors and build a strong foundation for a successful career in financial planning.

"AMP has given me the confidence, skills and resources needed to succeed as an advisor. The extensive network of coaches, mentors and support available through the program has been instrumental in helping me better serve my clients and continue developing my practice."

Another factor that drew Elijah to Raymond James was the opportunity to become involved with the Black Financial Advisor Network (BFAN).

"Learning about BFAN and the meaningful connections it fosters among advisors with shared experiences and goals reinforced my decision to join the firm. Being a part of BFAN has provided valuable mentorship, expanded my professional network, and allowed me to learn from others as I continue to grow my business. I'm especially excited to pay it forward by sharing the knowledge and experiences I've gained with the next generation of advisors."

TERRANCE DEDRICK, AAMS®, CRPC®, AIF®
Financial Advisor

Terrance came to AMP to kick-start his career after being a collegiate athlete.

"My father has been in the industry for years, but I didn't really know the specifics of what he did. AMP gave me tools to start prospecting and building relationships with people to prepare to join the business," he said. "A lot of people hear the term financial advisor, but they don't know the day-to-day operations of being an advisor."

In addition to preparing Terrance for a career as a financial advisor, he was able to find a network of peers that he can connect with on a meaningful level.

"Having people that look like you, that you can bounce ideas off of, that you can talk to about some of the things you might encounter is very important. Some of the challenges that we might be going through are different from other colleagues' challenges. Having a group like BFAN to understand those challenges and talk best practices makes a big difference."

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**.

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