RAYMOND JAMES

Developing the next generation of LGBTQ+ 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 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 members of the LBGTQ+ community and the Pride Financial Advisors Network (PFAN), set up their careers for success.

SHARON DUNAWAY-ALT, AAMS®
Financial Advisor

Sharon was interested in becoming an advisor from the moment she started as an assistant to her financial advisory team – that was always her plan. She came to the group with a decade of experience as a paralegal but was looking for a second career in a new industry.

“AMP paved the way for me,” she said. “It gave me the knowledge of what a day in the life of an advisor looks like.”

Also important to Sharon’s decision to join Raymond James and grow her career were the programs that made her, a member of the LBGTQ+ community, feel like she belonged.

“It’s always been really important for us to be our true selves because it’s a better way for us to serve our clients and our relationships. Having Raymond James behind us and seeing our team being open has brought us a lot of business. It’s really helped our clients who had to be closeted years ago and couldn’t really talk to advisors openly. They can now bring their whole selves to meetings with their financial advisors.”

MELISSA L. TAYLOR, CFP®
Financial Advisor

After nearly a decade at Raymond James, Melissa joined AMP because she was ready to make something of her own, and she knew Raymond James was the place to do it. “AMP has given me a clear blueprint about the experience I want my clients to have,” she said. “What’s made the biggest difference for me has been the connections. Having access to other advisors and their willingness to share their perspectives has been incredibly valuable. Seeing others like me build successful practices through AMP has given me a lot of confidence as I build my own.” It was also important for Melissa to grow her business somewhere she could be herself. “Knowing the firm supports LGBTQ+ advisors and clients really makes a difference. It allows me to show up as I am, and that carries through to the relationships I’m building and the support I can provide.”

MEGAN MILLER, AAMS®, ABFP®
Financial Advisor

Megan became interested in exploring the advisor career path while working initially in a support role at Raymond James.

"I thought about going into an advisor role, and this program helped me take that next step," she said. "AMP truly created a road map for us on how we're going to build our business. I walked away being very excited and knowing exactly the path I was going to take and what kind of business I wanted to build."

Being part of the LBGTQ+ community, Megan also recognized the importance of being her authentic self at work and finding support from her company for overcoming challenges.

"I think companies are better with more inclusion. Raymond James walks the walk and continues to add to our Advisor Inclusion Networks. It has changed the game for me. In a professional setting, I'm building my own business, as a solo advisor, because I show up as myself. It takes on another meaning, being able to just be myself and make those connections."

AINE KING, AAMS™, ABFP®
Financial Advisor

Aine was drawn to the advisor path out of a desire to build meaningful, lasting relationships while helping clients navigate some of life's biggest financial decisions. Through the AMP program, she gained the structure, mentorship and confidence to continue growing her business and serving clients authentically.

"AMP gave me the skills and tools needed as I navigated growing my business while also giving me the opportunity to connect with peers who were building their practices alongside me," she said. "It helped reinforce the kind of advisor I want to be and the experience I want clients to have."

As a member of the LGBTQ+ community, Aine understands the value of creating an environment where clients feel comfortable being completely themselves.

"Financial planning is deeply personal, and people want to feel seen, understood and respected," she said. "Being open about who I am has helped me build genuine trust with clients. It allows conversations to go beyond finances and focus on the life someone truly wants to build. When people feel safe bringing their whole selves to the table, it creates stronger relationships and better outcomes."

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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