

2023

FA CE SURVEY

Offering value-add continuing education is a great way to strengthen your advisor relationships. But have you ever wondered which topics they're most interested in or how they prefer to take their CE? In this infographic, we highlight the results of our 2023 Financial Advisor Survey!



CHANGING TIMES

2023 saw a decrease in the 30-49 age ranges compared to recent years and a significant increase in the 60+ range.

21-29

4%

30-39

12%

40-49

14%

50-59

23%

60 +

45%



FIRM TYPE

Financial Planning
51%

Securities Broker/Dealer
34%

Insurance
41%

Accounting
2%

Other
8%



DELIVERY PREFERENCE



Webinar CE

A new majority (40%) of advisors prefer to take their CE via webinar, compared to 30% in 2022.



Online/Self-Study CE

Dethroned for the first time, 34% of advisors prefer CE online (via self-study), compared to 58% in 2022.



Classroom (Instructor-Led) CE

14% of advisors prefer Classroom CE over other delivery methods, compared to 3% from last year.



Super CE

Overall, 13% of advisors prefer Super CE over other delivery methods, compared to 8% last year.

EDUCATION

Of the advisors we polled, these numbers represent the top four CE requirements they need training on, year-after-year.

Life/Health

85%

CFP

41%

LTC

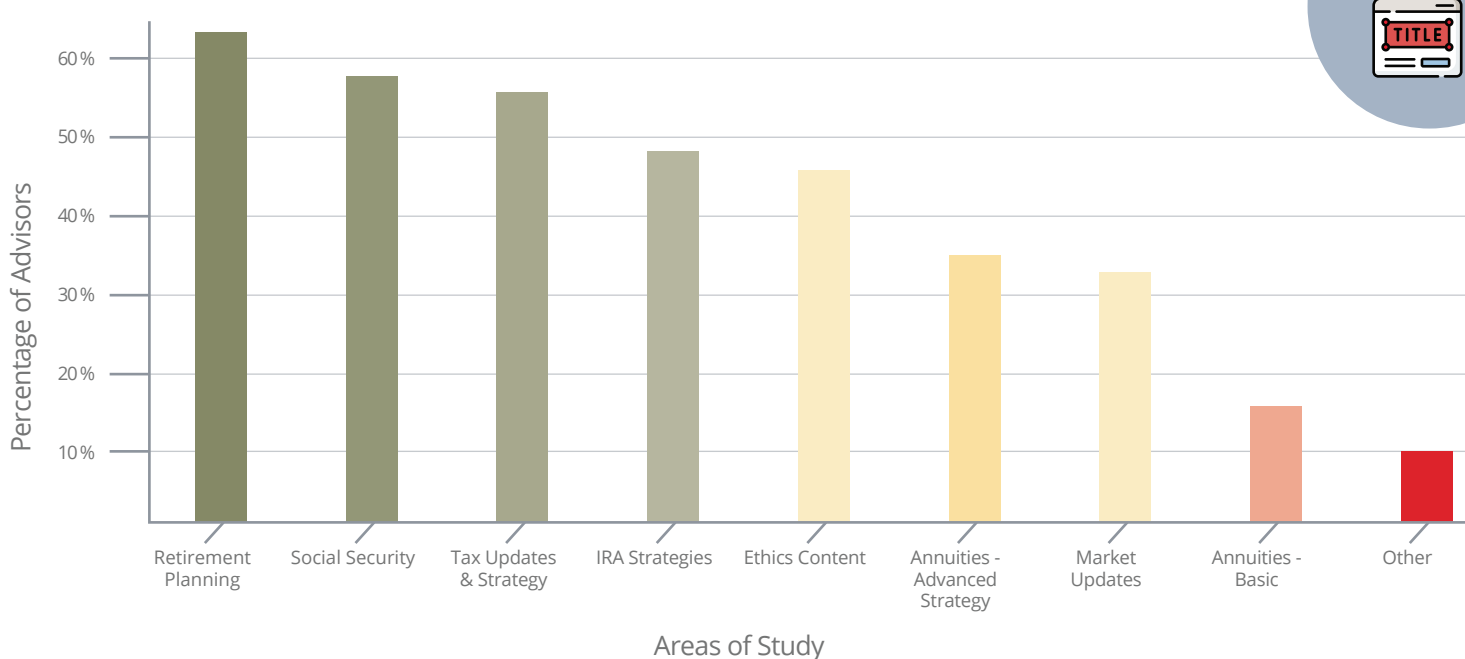
37%

Other

17%



TOPICS OF INTEREST



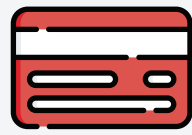
LIKELIHOOD OF ATTENDANCE

86%

of advisors said they are more likely to attend an event that offers free CE.

70%

of advisors said they view wholesalers that offer CE as more knowledgeable.



81% of advisors say they are either somewhat likely to very likely to use a CE voucher card given to them by a wholesaler who does not offer live CE sessions.

ADVISOR MEETINGS

Our recent survey saw a decrease of 16% of advisors who said they would not be participating in any kind of advisor meeting.



None



One-On-One



Up to 10 People



10 or More

DELIVERY METHODS SINCE PANDEMIC

According to this year's survey, more advisors prefer more virtual and online delivery methods since the COVID 19 pandemic.



Prefer getting back to face-to-face

11%

Prefer mix of both online and in-person

26%

Hasn't changed at all

29%

Prefer more virtual and online

34%

