

2024

FA CE SURVEY

This infographic highlights the results of a survey that went to 20,000 financial advisers to gather valuable feedback about the continuing education (CE) they need and the wholesalers they work with that provide it at no cost.

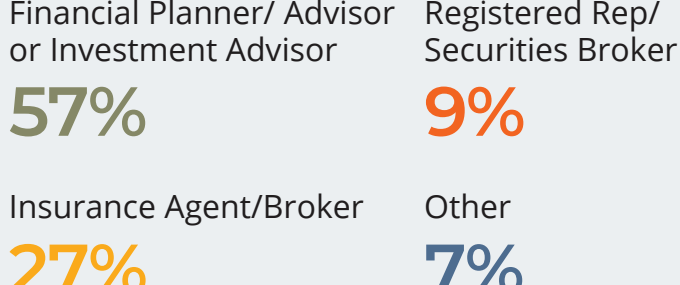
Age Range

What category below includes your age?

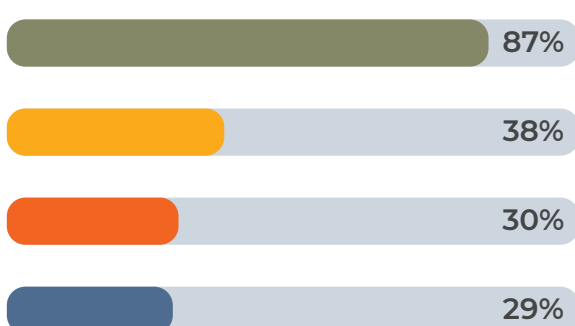


Job Function

Please provide the answer that best describes your job function:

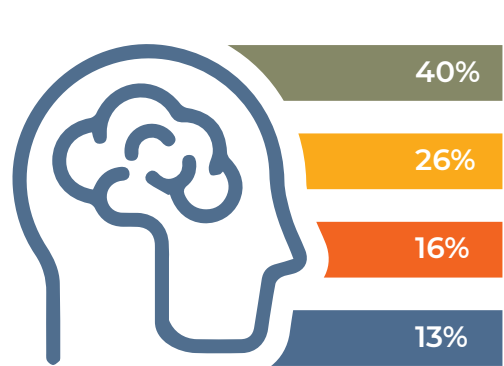
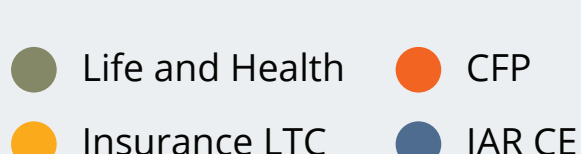


Other
16% of respondents said other, which included Firm Element, AIF/ASPPA, and RICP CE.



Required Training

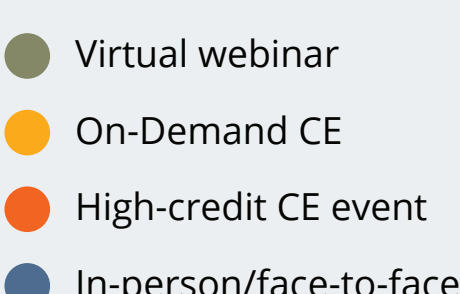
What continuing education is required of you (top four responses)?



Voucher Cards
5% of respondents said they prefer voucher cards or electronic vouchers.

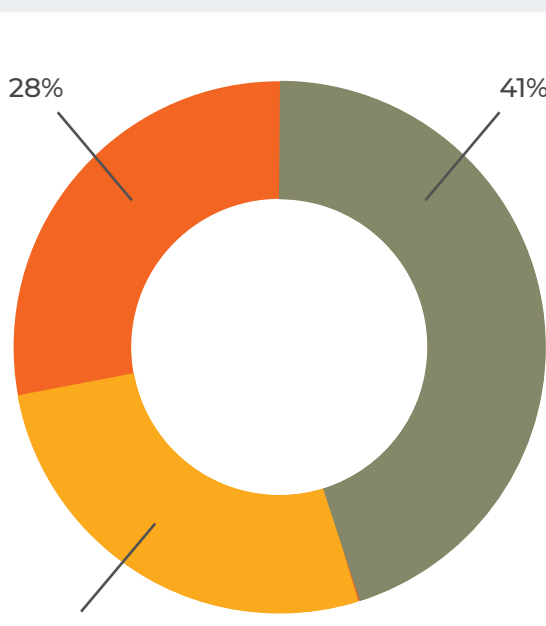
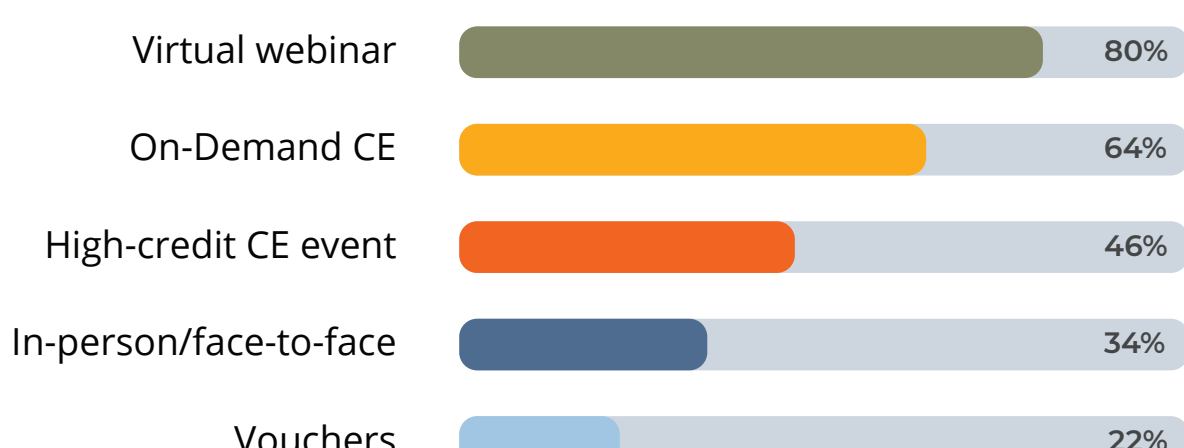
Preferred Delivery

Which method of CE do you prefer MOST (choose one)?:



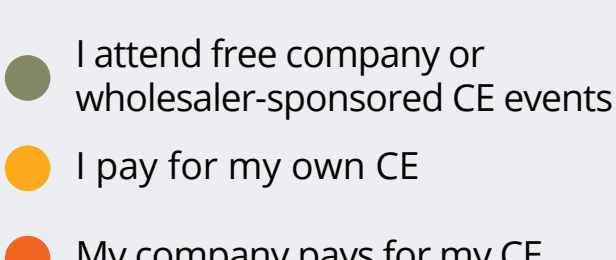
Interested Delivery

Which delivery methods of CE would you be interested in to satisfy your requirements?



Who's Paying?

How do you pay for the majority of your continuing education credits?

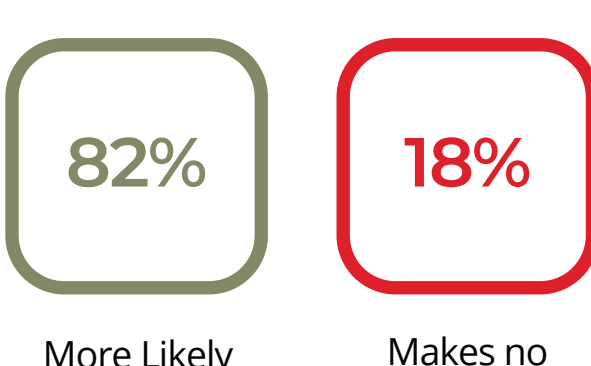


Advisor Influence

Generally, I view wholesalers that offer CE as being more knowledgeable about products and services than those that do not?

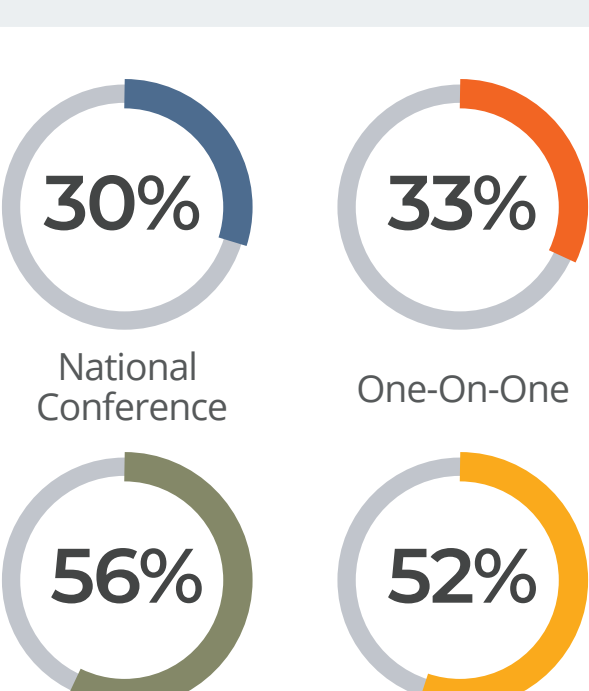


How likely are you to attend a wholesaler-led event/webinar that offers free CE (versus no CE at all)?



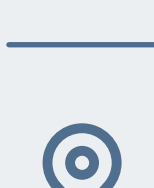
Learning Topics

Which areas of study are you most interested in receiving training on?



Advisor Meetings

What type of in-person advisor meetings do you like to participate in?



None
9% of respondents said they do not like to participate in any in-person advisor meetings.