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?

21-29 6%

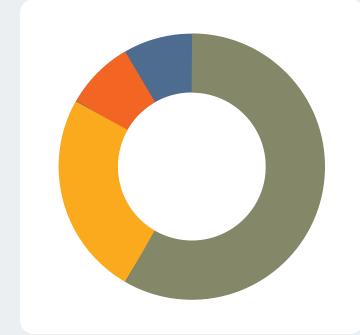
30-39

40-49

50-59

No Response





Job **Function**

Please provide the answer that best describes your job function:

or Investment Advisor

Financial Planner/ Advisor

Securities Broker

Registered Rep/

57%

Insurance Agent/Broker

Other

27%

7%

Required **Training**

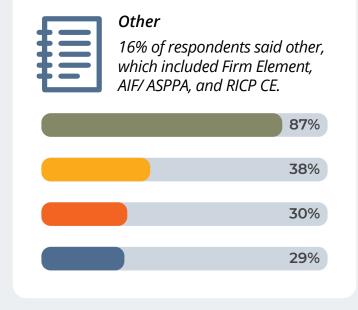
What continuing education is required of you (top four responses)?

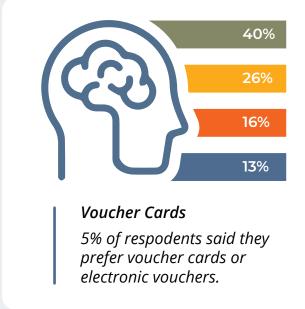
Life and Health

Insurance LTC

CFP

IAR CE





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

Prefered

Virtual webinar

On-Demand CE

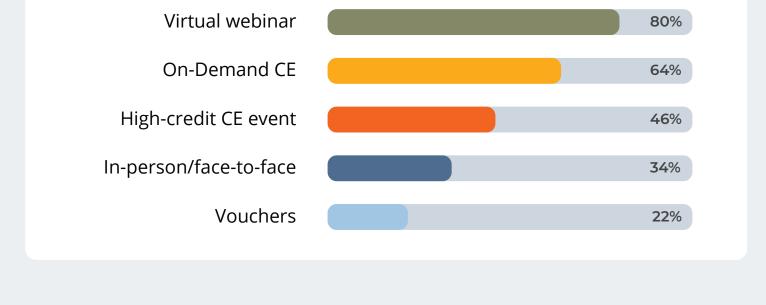
High-credit CE event

In-person/face-to-face

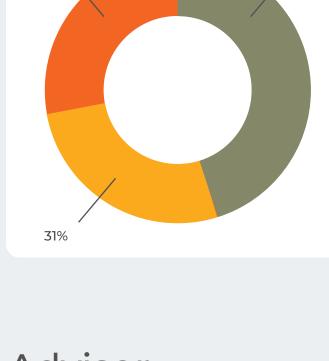
Intersted **Delivery**

interested in to satisfy your requirements?

Which delivery methods of CE would you be



41%



28%

No

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

Who's

I attend free company or wholesaler-sponsored CE events

My company pays for my CE

Difference

60%

59%

I pay for my own CE

How likely are you to attend a Advisor wholesaler-led event/webinar that **Influence** offers free CE (versus no CE at all)? Generally, I view wholesalers that offer CE as being more knowledgeable about products and 82% 18% services than those that do not? Yes **72**% More Likely Makes no

28%

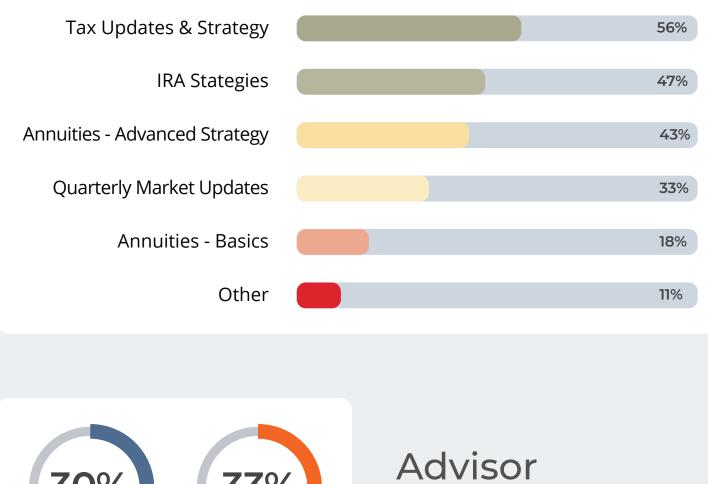
Retirement Planning Social Security

Learning

Topics

Which areas of study are you most

interested in receiving training on?



30% National One-On-One Conference **52**% 56% Up to 10 People 10 or More

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.