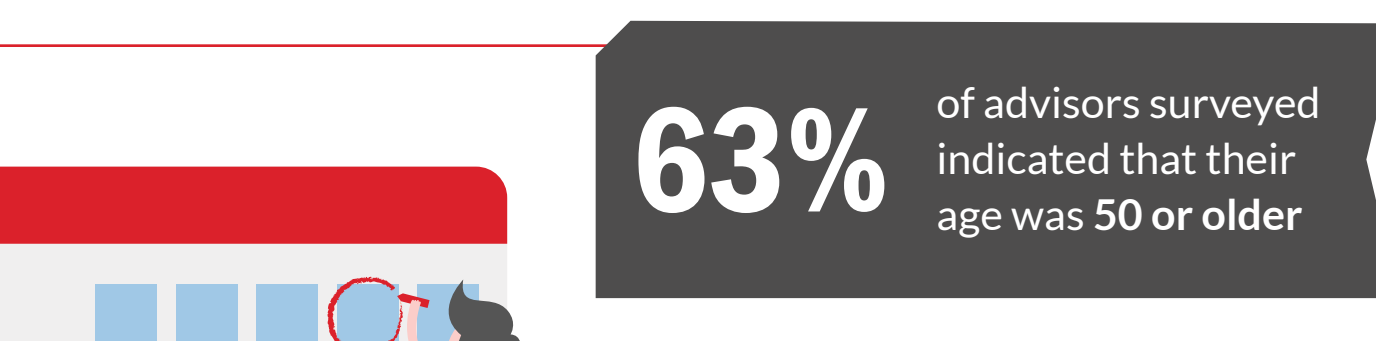


CAPITALIZING ON CONTINUING EDUCATION

Ever wonder how financial advisors view wholesalers that offer continuing education? Here's a look at the results of our 2020 Financial Advisor survey.

What category below includes your age?



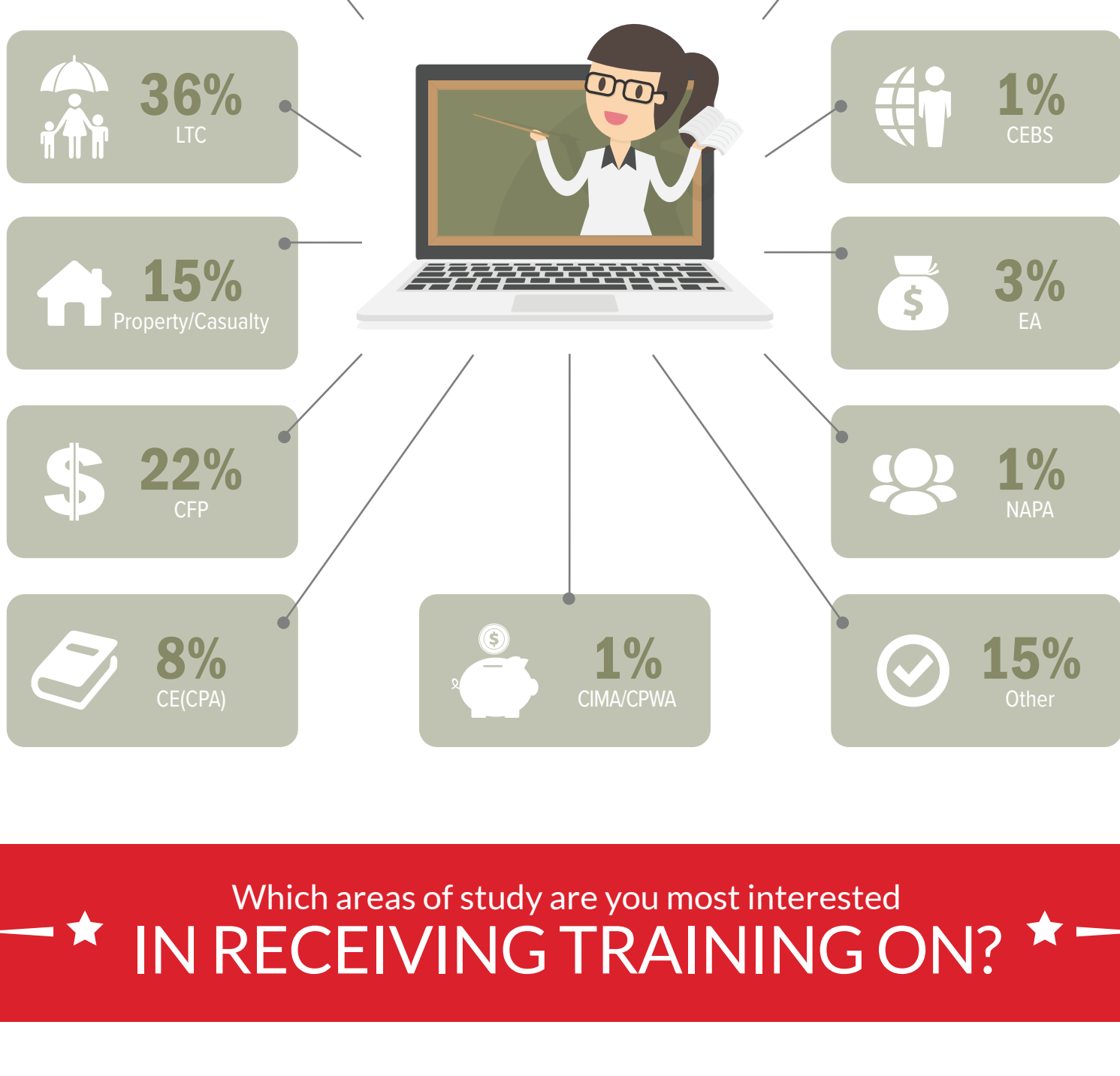
63% of advisors surveyed indicated that their age was 50 or older

“ THE AVERAGE AGE OF A FINANCIAL ADVISOR IS 55 ”

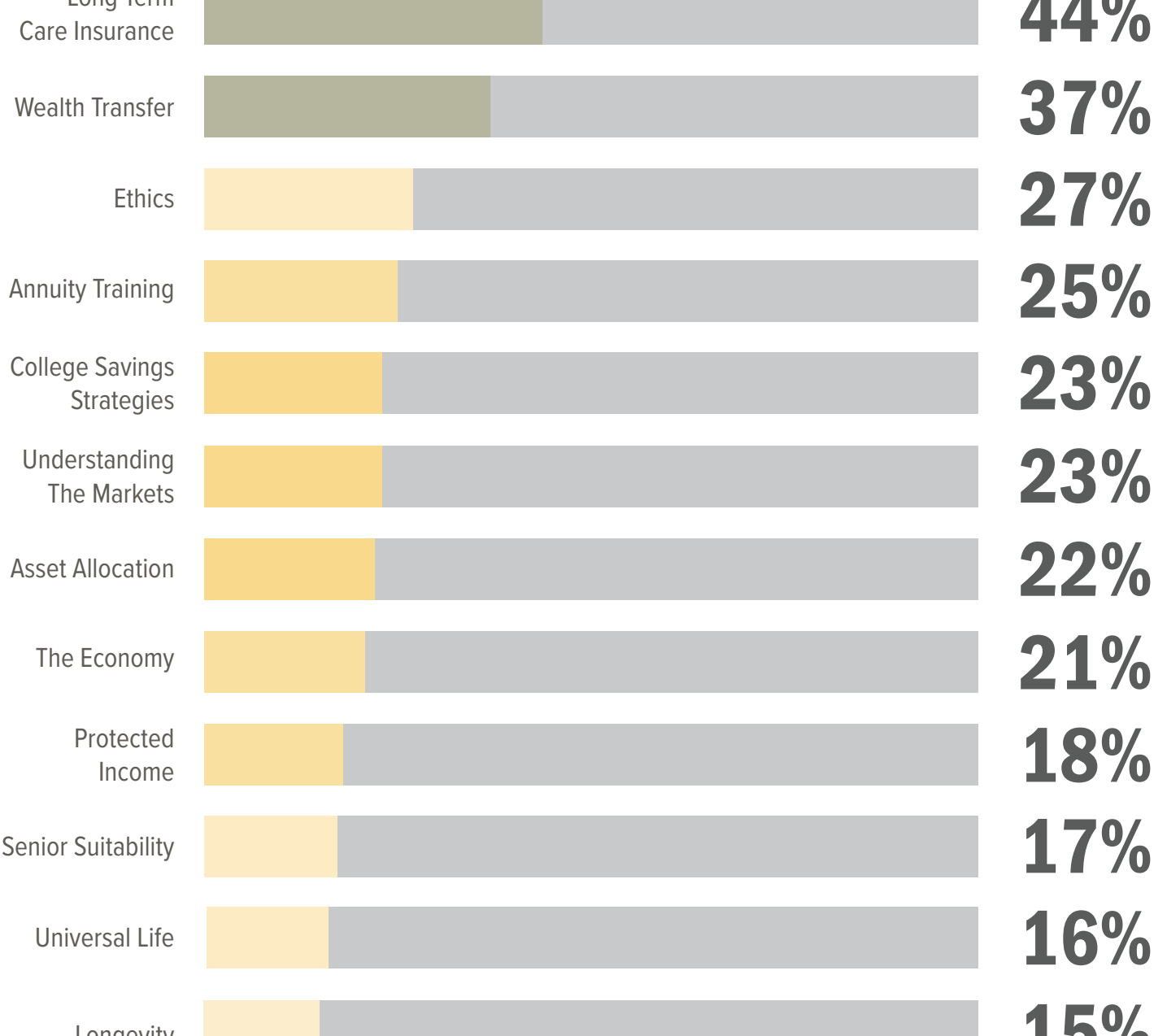
Which of the following best describes the type of firm you EITHER OWN OR WORK FOR?



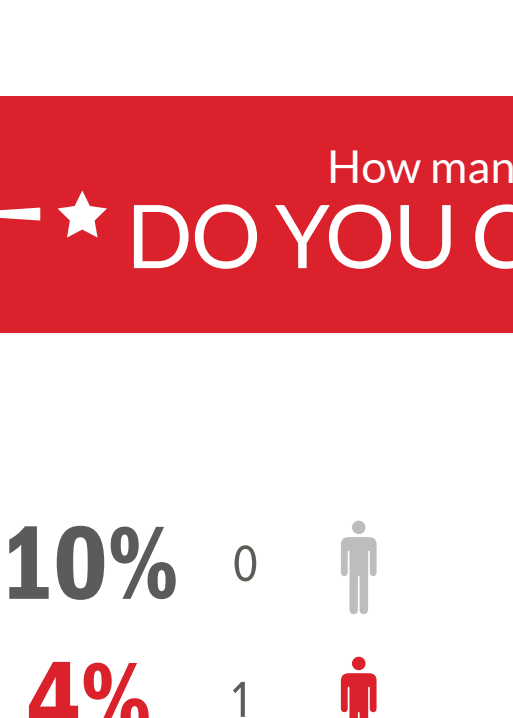
What continuing education is REQUIRED OF YOU?



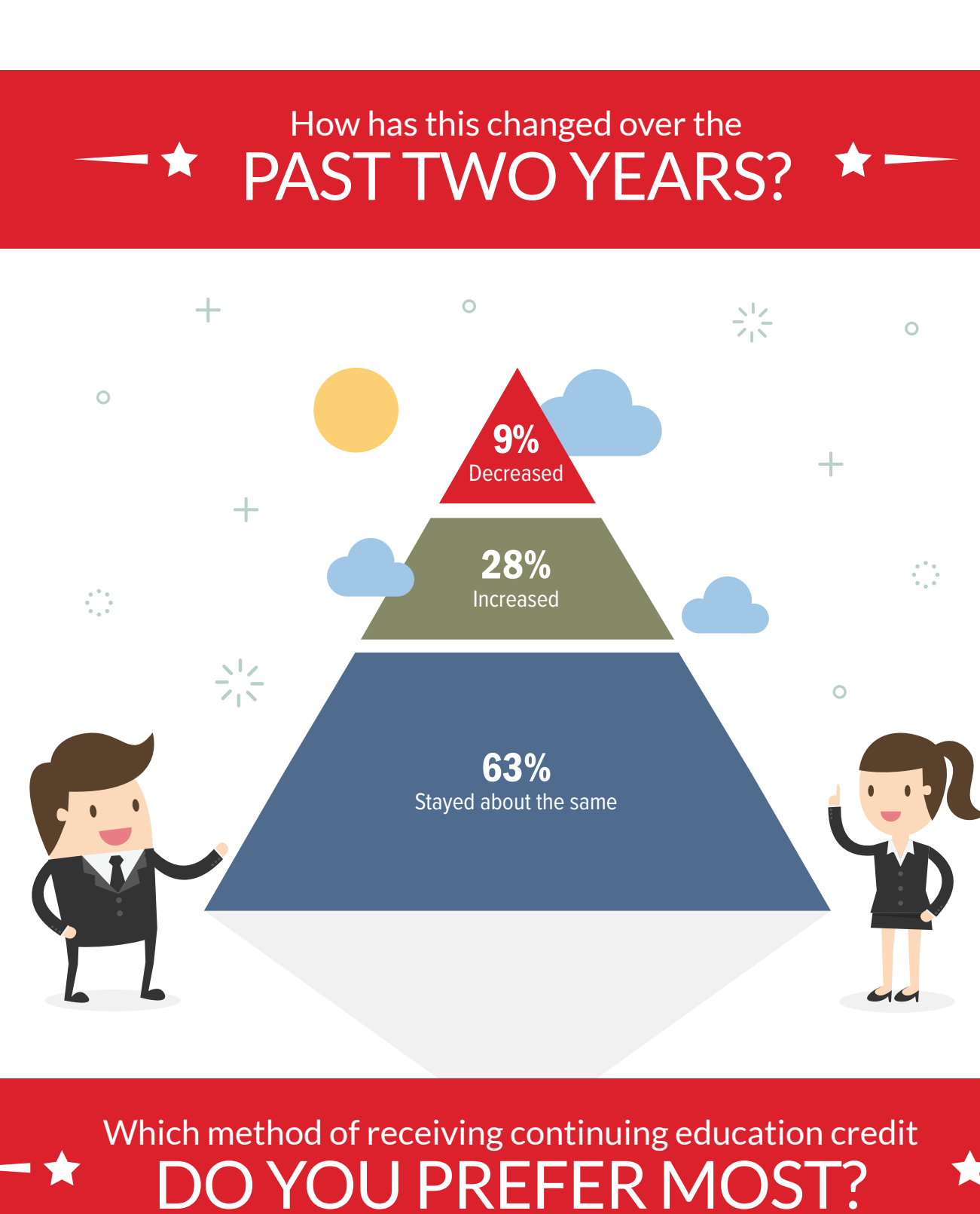
Which areas of study are you most interested IN RECEIVING TRAINING ON?



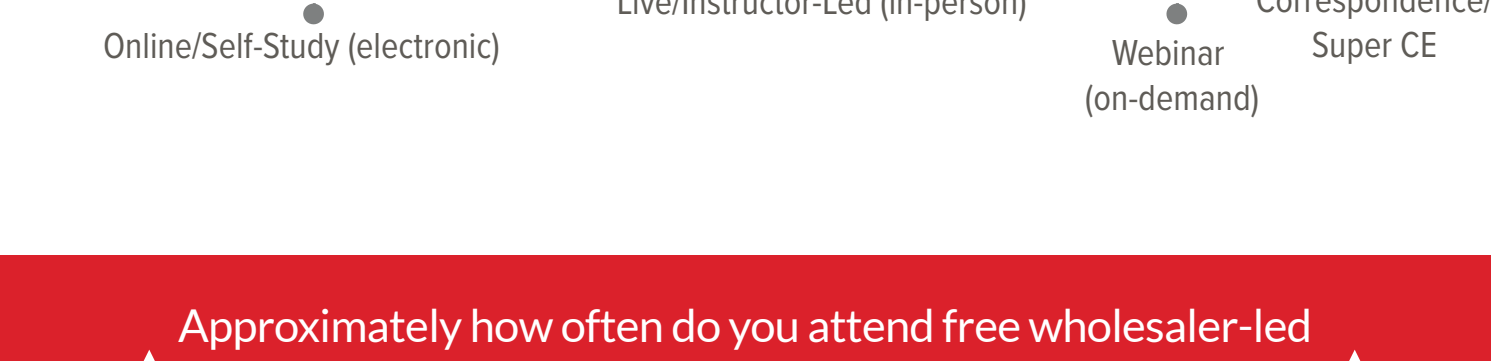
How many wholesaler relationships DO YOU CURRENTLY HAVE?



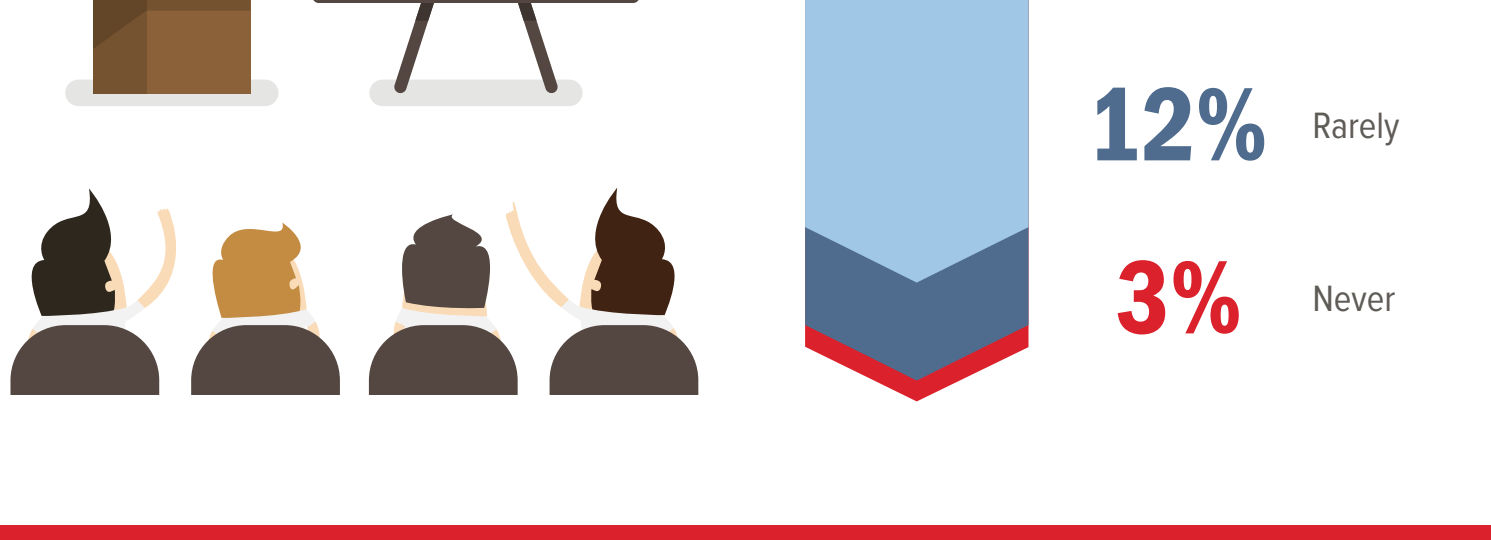
How has this changed over the PAST TWO YEARS?



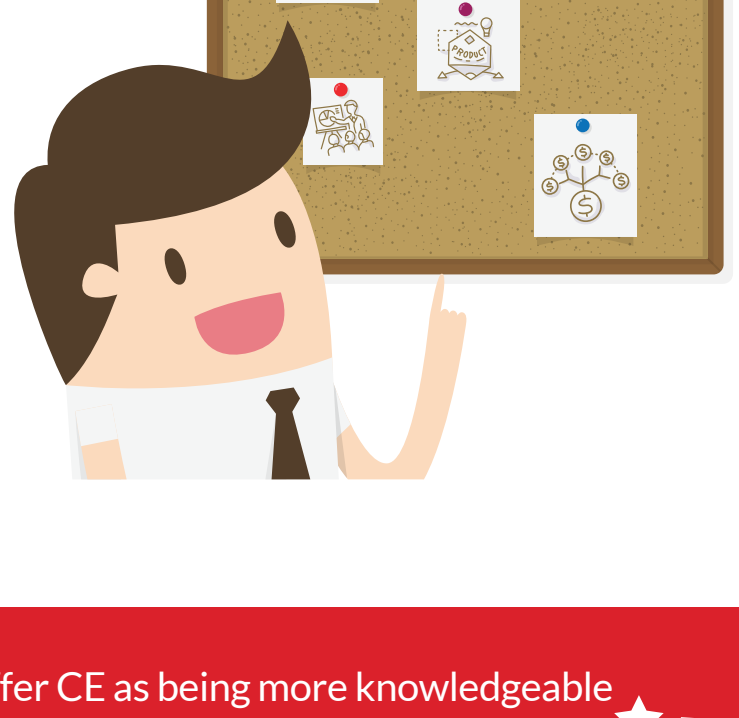
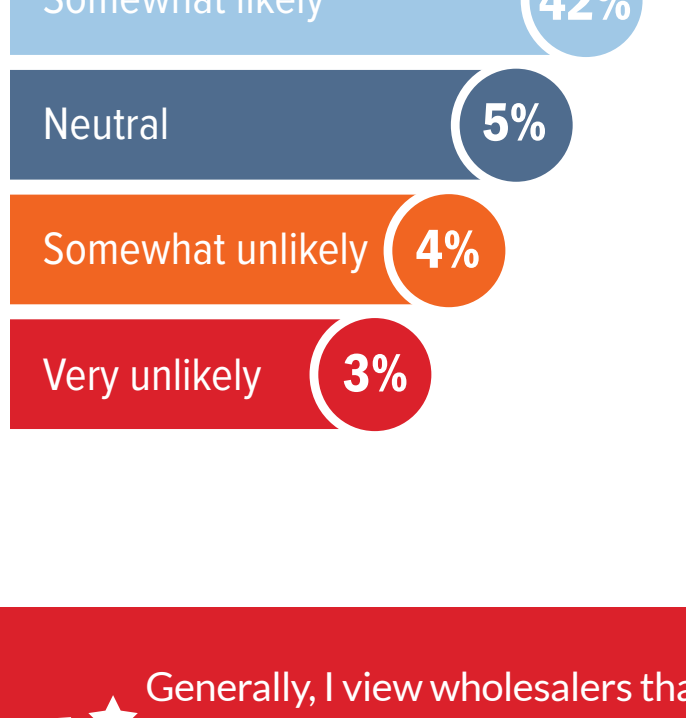
Which method of receiving continuing education credit DO YOU PREFER MOST?



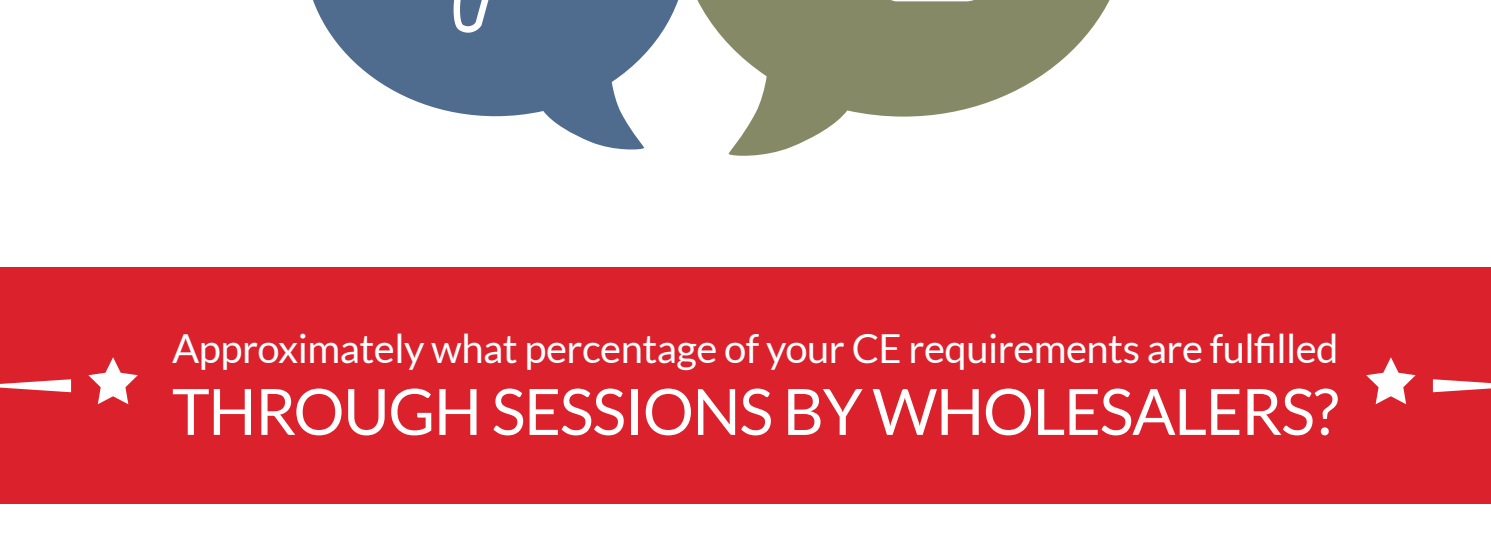
Approximately how often do you attend free wholesaler-led CONTINUING EDUCATION?



How likely are you to attend a wholesaler-led CE session compared TO A MEETING ABOUT THEIR PRODUCTS?



Generally, I view wholesalers that offer CE as being more knowledgeable ABOUT THE PRODUCTS/SERVICES OFFERED



Approximately what percentage of your CE requirements are fulfilled THROUGH SESSIONS BY WHOLESALERS?



Approximately what percentage of wholesalers who visit your branch OFFICE OFFER CONTINUING EDUCATION?



How likely are you to use a CE voucher card given by a wholesaler WHO DOES NOT OFFER LIVE CE SESSIONS?

