

# 2022

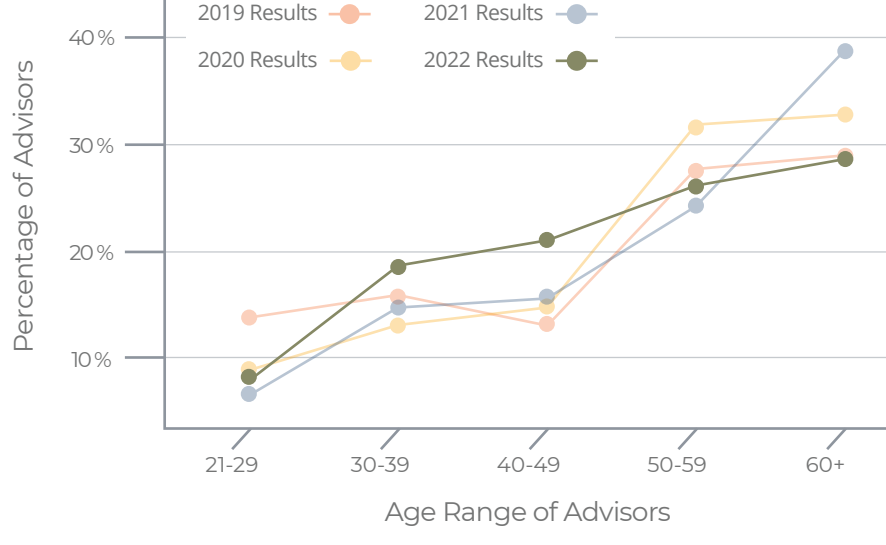
## FINANCIAL ADVISOR CE SURVEY

Does your firm and/or wholesalers offer value-add CE to the advisors you work with? In this infographic, we highlight the results of our 2022 Financial Advisor Survey, while also digging into some common trends from the past four years.

### CHANGING TIMES

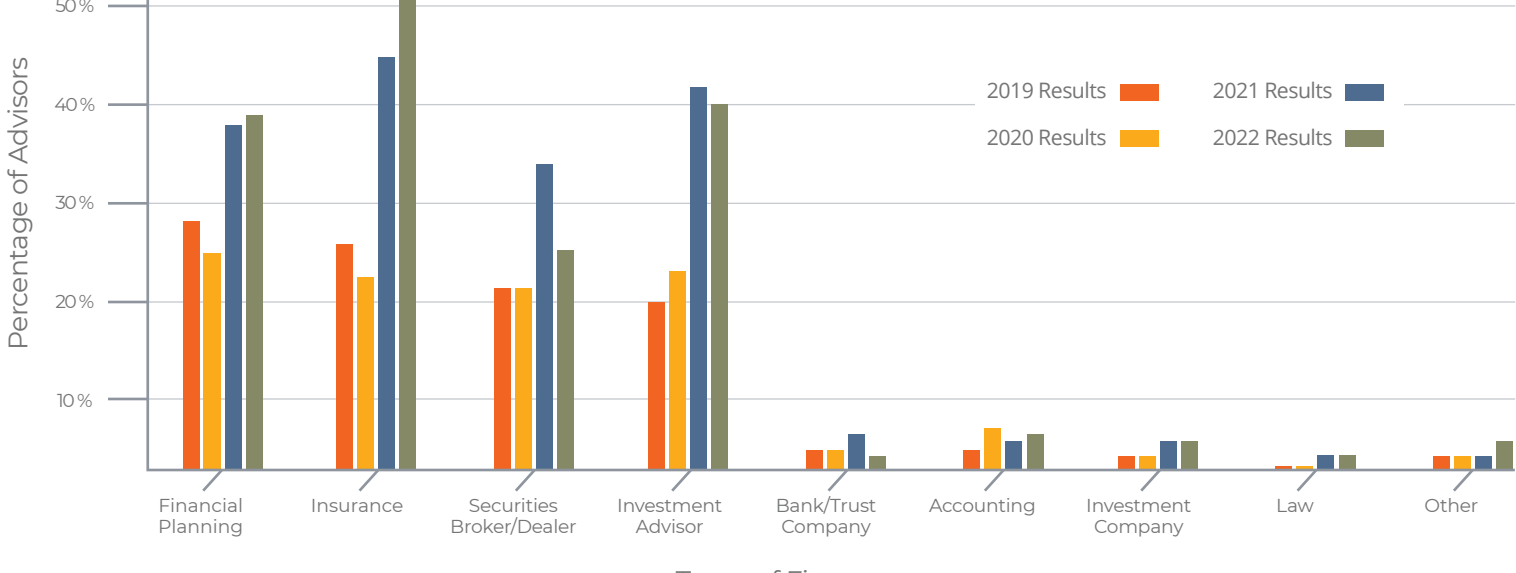
Over the course of the past four years, advisors in the 30-40 age range has increased, while the number of active advisors in the 60+ age range has decreased.

**23%** of advisors surveyed this year were between the age of 21-39 (i.e. millennials)



### FIRM TYPE

The following graph breaks down the type of firm respondents' work at.



### DELIVERY PREFERENCE

The following data describes which delivery method advisors prefer to take their continuing education.



**Online/Self-Study CE**  
The majority (58%) of advisors prefer to take their CE online (via self-study), compared to 45% back in 2019.



**Webinar CE**  
A total of 30% of advisors prefer to take their CE via webinar, compared to 22% back in 2019.



**Super CE**  
Overall, 8% of advisors prefer Super CE over other delivery methods, compared to 3% back in 2019.



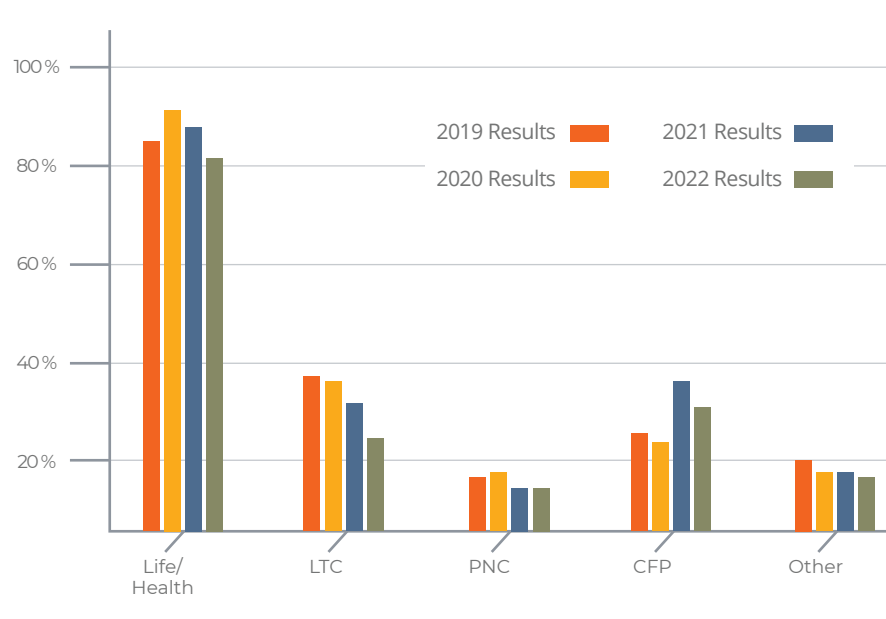
**Classroom (Instructor-Led) CE**  
3% of advisors prefer Classroom CE over other delivery methods, compared to 30% back in 2019.

**88%** of respondents said that, due to the Coronavirus pandemic, they continue to work towards completing their continuing education requirements utilizing Online and Webinar CE.

### EDUCATION

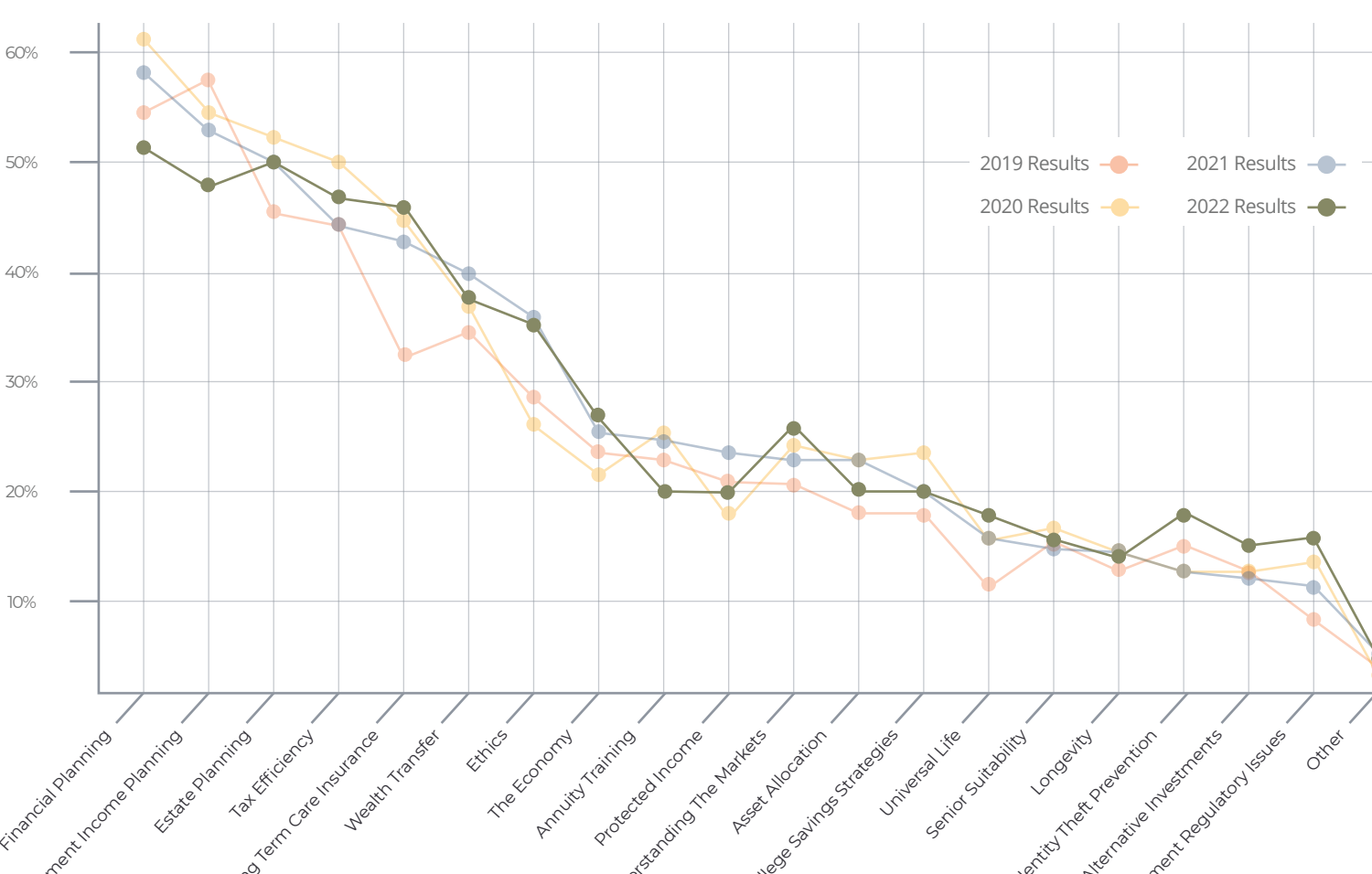
Of the advisors we polled, this graph outlines the top five continuing education requirements they need training on, year-after-year.

**Life & Health is consistently the number one requirement.**



### TOPICS OF INTEREST

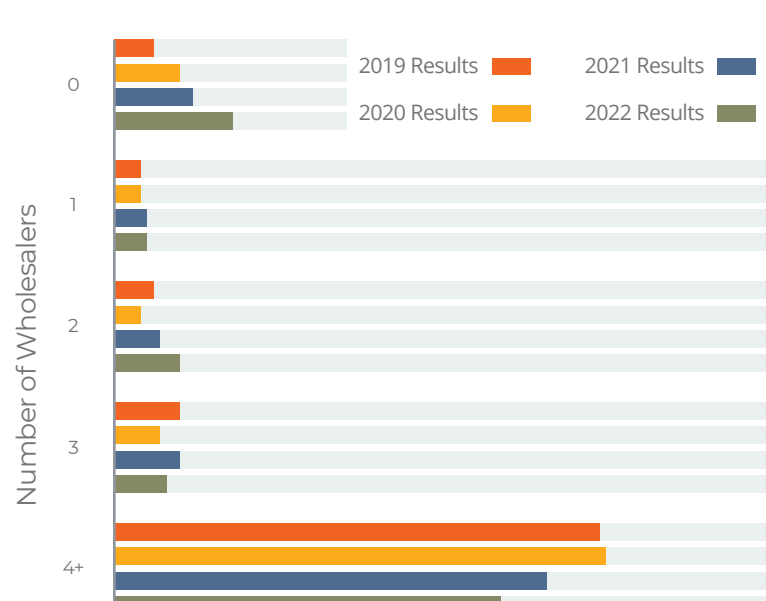
These are the areas of interest advisors like to receive training on.



### WHOLESALE RELATIONSHIPS

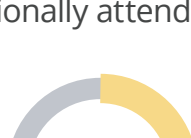
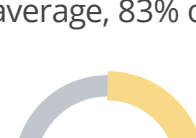
Since 2019, the number of advisors working with zero wholesalers grew 12%, whereas advisors with four or more wholesaler relationships has gone down 15%.

**19%** of advisors reported this year as having zero wholesaler relationships.



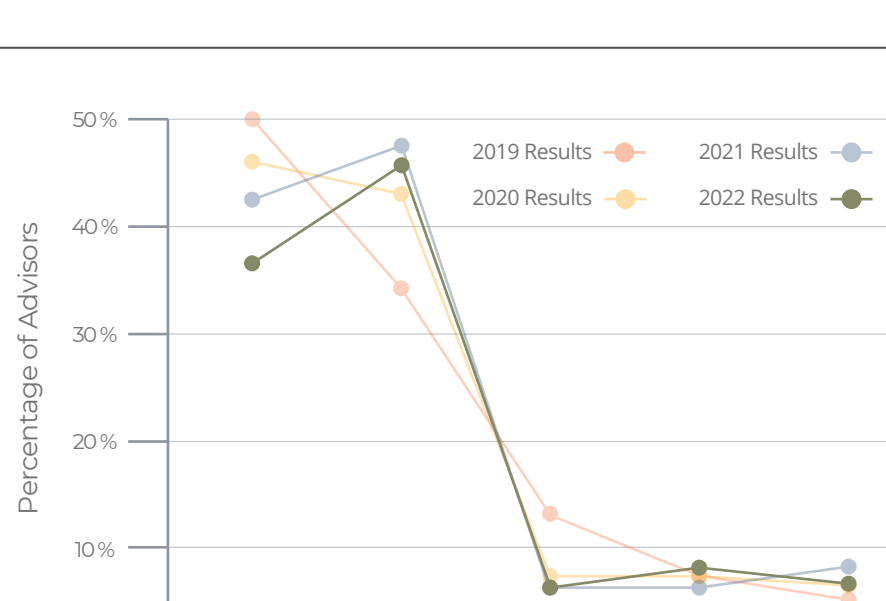
### CURRENT DEPENDANCE

On average, 83% of advisors will either frequently or occasionally attend free wholesaler-led CE sessions.



### LIKELIHOOD OF ATTENDANCE

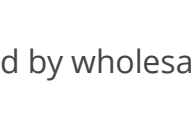
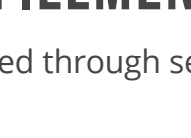
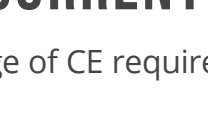
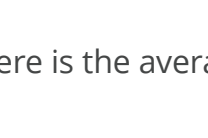
According to our research, financial advisors are significantly more likely to attend a wholesaler meeting when CE is being offered, versus a meeting simply to discuss products.



**79%** of advisors view wholesalers that offer continuing education as being more knowledgeable about the products and services being offered in the industry than those that do not.

### CURRENT CE FULFILLMENT

Here is the average percentage of CE requirements fulfilled through sessions offered by wholesalers.

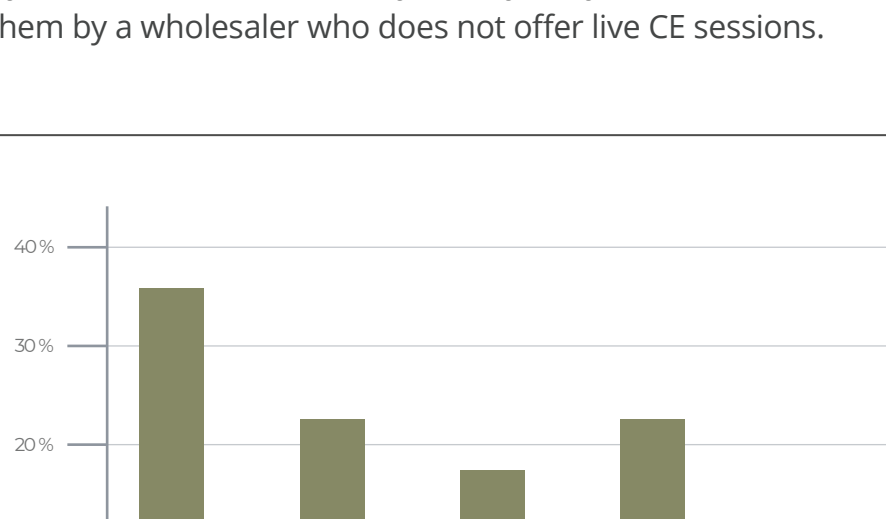


87% of advisors say they are either somewhat likely to very likely to use a CE voucher card given to them by a wholesaler who does not offer live CE sessions.

### ADVISOR MEETINGS

According to our recent survey, 26% of advisors are temporarily/indefinitely not participating in any in-person advisor meetings as of now.

An additional 35% of advisors reported only participating in one-on-one meetings.



### WORKING CONDITIONS

According to this year's survey, 29% of advisors are working exclusively remotely, whereas 34% of advisors are back in the office, full-time.

The rest of advisors are working 50% in the office, 50% remotely.

