

Financial Planning Jump Start Program

Osaic Insights



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Whitney is currently a financial professional at The Alpine Financial Planning Group and is a graduate of the Financial Planning Jump Start program. She shares her experience and insights into why financial professionals should invest in the program

Benefits to joining Financial Planning Jump Start

✓ Relationship building

The Financial Planning Jump Start program allows you to learn the fundamental objectives and goals of a client discovery meeting so you can drive more value during client conversations. Through the help of expert coaches, the program provides the opportunity to expand your client base by providing planning services to new generations and build long lasting relationships to launch your career.

“The program accelerated my learning process and made me feel comfortable quicker when having conversations with clients and knowing what to ask.”

✓ Resources & tools

Through the Jump Start dashboard, you will be introduced to an extensive list of downloadable resources and tools at your disposal. When joining the program, you will be able to learn from the “best of the best” coaches to strengthen your skillset.

“The resources were endless, from workflow videos to marketing tools, there is great support on the backend”.

Gain expert advice and mentorship from senior financial professionals through coaching and education.

Why you should invest in yourself

“When you take the first step to invest in the program, you will learn how to improve client engagement, better access to resources, and build a lifelong business in the world of finance”

-Whitney Figueroa

Let us walk you through it

To learn more about the Financial Planning Jump Start program, access the resource [here](#).

To learn more about Whitney, access Osaic's women advisory board [here](#).