osaic

Wealth Advisor Academy

Wealth Advisor Academy provides a unique blend of technical knowledge and relationship management skills to help you engage in deeper, more productive conversations with clients and prospects to identify additional needs, assets, and referrals.

Knowledge

Delivered in a combination of in-person workshops led by industry leaders plus online modules to enhance your wealth management knowledge and relationship building skills.

Skills

Focused on building communication skills in the art of conducting discovery conversations, presenting financial plans, and running effective client meetings to deliver exceptional client experiences and move clients toward their desired goals.

Application

Facilitator-led check-points focused on knowledge implementation, overcoming challenges, and sharing best practices.

Program Details:

- **Participants:** Cohort groups of 20-25 growth-focused financial professionals who are advisory and financial planning oriented.
- **Time commitment:** Two in-person sessions, four 90-minute virtual sessions and educational modules over six months, along with client engagement activities. Average time commitment 1-3 hours per week of learning and client related activities.
- **2025 Cohort options:** Choose your cohort based on location. Contact BusinessConsulting@osaic.com for additional cohort dates in Minneapolis, MN and New York, NY.

	Philadelphia, PA	Newport Beach, CA	Scottsdale, AZ
1st In-Person Training	June 3-4, 2025	July 15-16, 2025	July 30-31, 2025
2nd In-Person Training	October 8-9, 2025	TBD	December 2-3, 2025

- **Investment:** $3,000 for 6-month program plus travel and lodging for the in-person workshops.

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Why participate in the Wealth Advisor Academy?

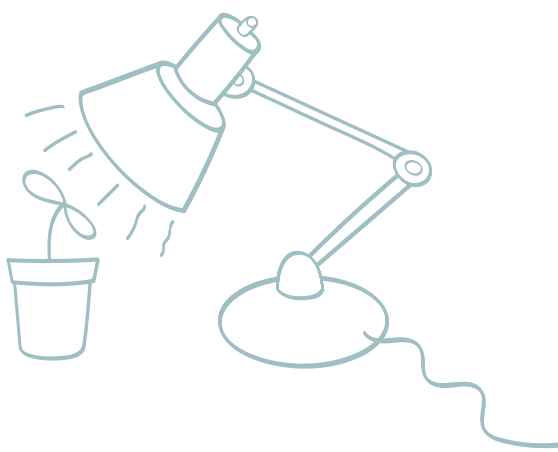
This exclusive business development opportunity provides a unique blend of technical knowledge and relationship management skills to help your clients achieve their goals. You'll learn from innovative and trusted external partners, industry thought leaders, Osaic subject matter experts, and your peers!

Who should participate? Financial professionals who are:

- Looking to accelerate the growth of their business.
- Willing to try new approaches to working with clients and prospects.
- Open to and enjoy sharing best practices with peers.
- Interested in learning how to deliver comprehensive solutions to help clients achieve their goals.

What you will learn:

- Enhanced communications and relationship building skills.
- Deeper understanding of the wealth planning process — tax and estate planning, retirement planning, risk management, etc.
- Key products and services to help your clients achieve their goals.
- Awareness of various tools and technology to help you serve your clients more effectively.
- Best practices to increase the efficiency of your business.



Interested?

Contact Jerry Schreck at gerald.schreck@osaic.com