

# Financial Planning Jump Start

Osaic Insights



**Eric Mooney**

Financial Advisor,  
Mooney Lyons

Eric graduated from the University of Northern Iowa with a Bachelor of Arts Degree in Finance with a concentration in Personal Wealth Management and is now a financial advisor at Mooney Lyons. Eric is also a recent graduate of Financial Planning Jump Start and shares his insights on the program.

## Benefits to joining Financial Planning Jump Start

### ✓ Competitive Advantage

The Financial Planning Jump Start program allows you to take a closer look at your practice and identify ways you can improve to stand apart from the competition.

You will learn the latest innovations in the industry and tactics to reach your target audience to scale your business.

“The program allowed me to go back to my team and share potential improvements to our practice to make a difference in our business”.

### ✓ Invaluable Feedback

During Jump Start, you will be split into smaller groups where you will participate in peer sharing and role-playing to gain valuable feedback. Through this process, you will be able to strengthen your interpersonal skills to add value to your practice and deepen your relationships.

“The biggest takeaway from the program was the peer evaluations. It was great feedback that I still use today”.

Gain tailored feedback from senior financial professionals through coaching and education.

### Invest in yourself

“Everyone needs to start somewhere, and this program really helps.”

-Eric Mooney

### Let us walk you through it

Learn more about the Financial Planning Jump Start program [here](#).