



# Career as a Financial Advisor

*A Component of BestPrep's Classroom Plus Program*

**Presenter Info: Name and Company**



# But first...a rap



HAPPEN TO HAVE FUNDS

**[Your Name Here]**



[High School]  
[Year]

# Client Story

# What is Your Perception of a Financial Advisor?

Risk Management

Investments

Retirement

Salesperson

Money

Trust

Wall Street

Advise

Budgets

Marketing

Wealth

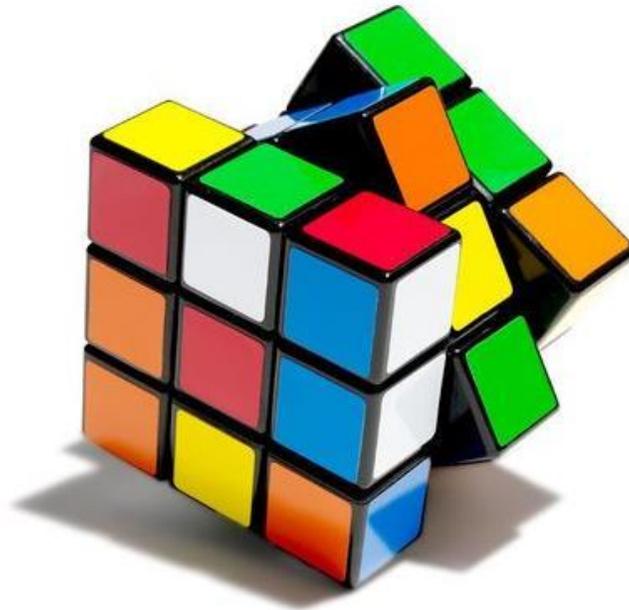
Fees

Strategic Thinker

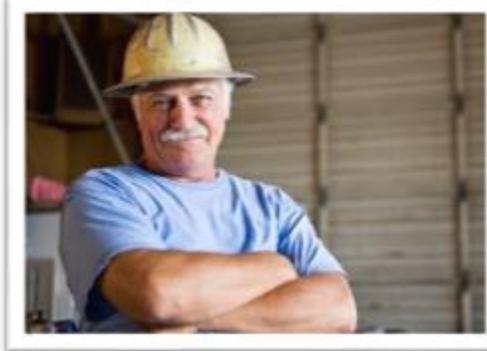
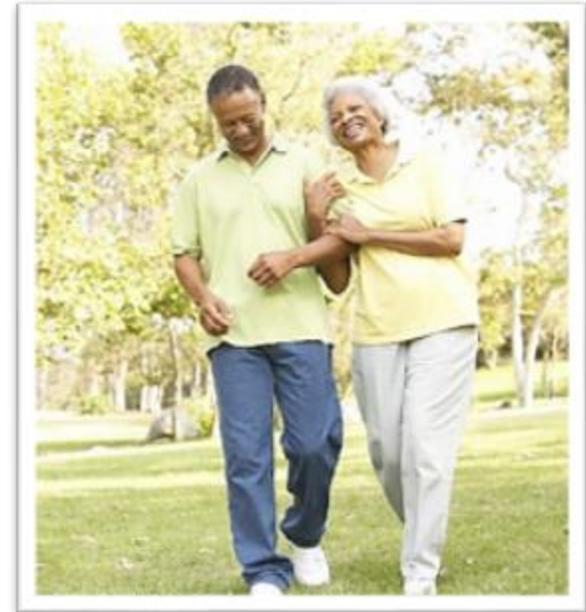
Guidance

# The Importance of Financial Advice

What Does A Financial Advisor Do?



# Who Works with an Advisor?



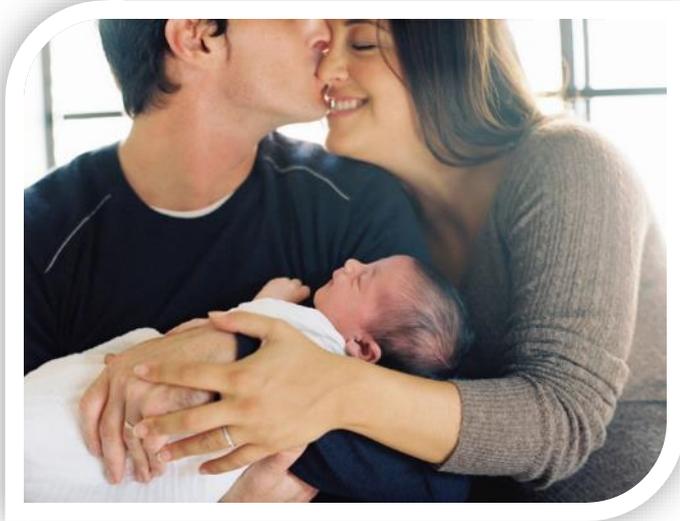
# Why do clients work with an Advisor?

Things Families  
**Can Control**

Things Families  
**Can Influence**

Things Families  
**Can't Control**

# Life Happens



College



New Car



Marriage



Home



# The World Happens



“The Stock Market Again Closed at New Record Highs”

“5 ways to hone retirement plans under new tax law”



“31,000 Toys 'R' Us employees: No job and no severance”

“The Facebook data breach wasn't a hack. It was a wake-up call.”



# Mistakes



Educate



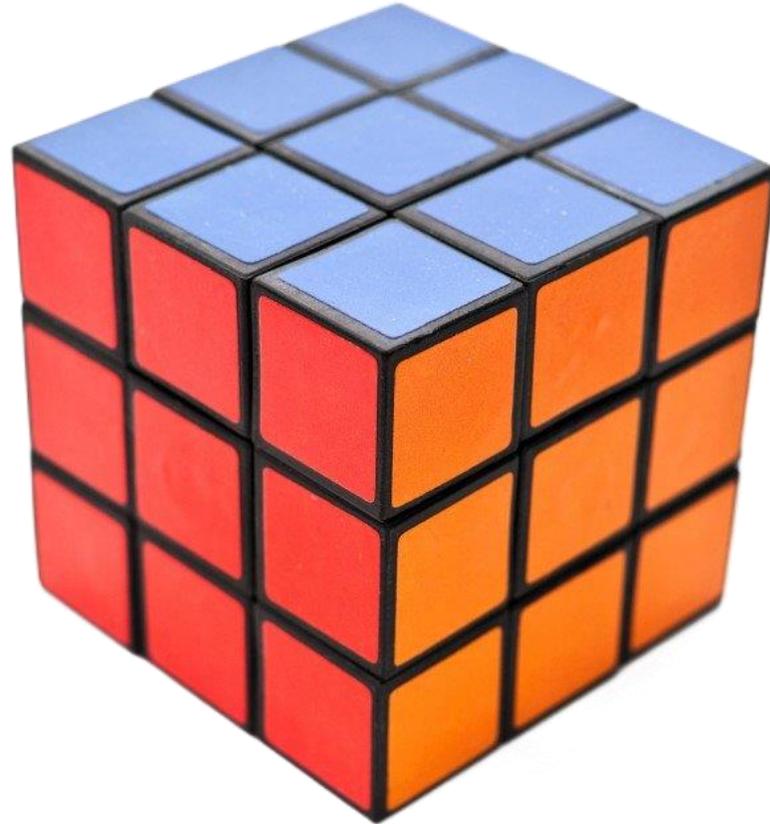
Strategy for  
Unexpected



Set Goals &  
Prioritize



# Financial Advisors are Problem Solvers!



# Financial Advisor Traits



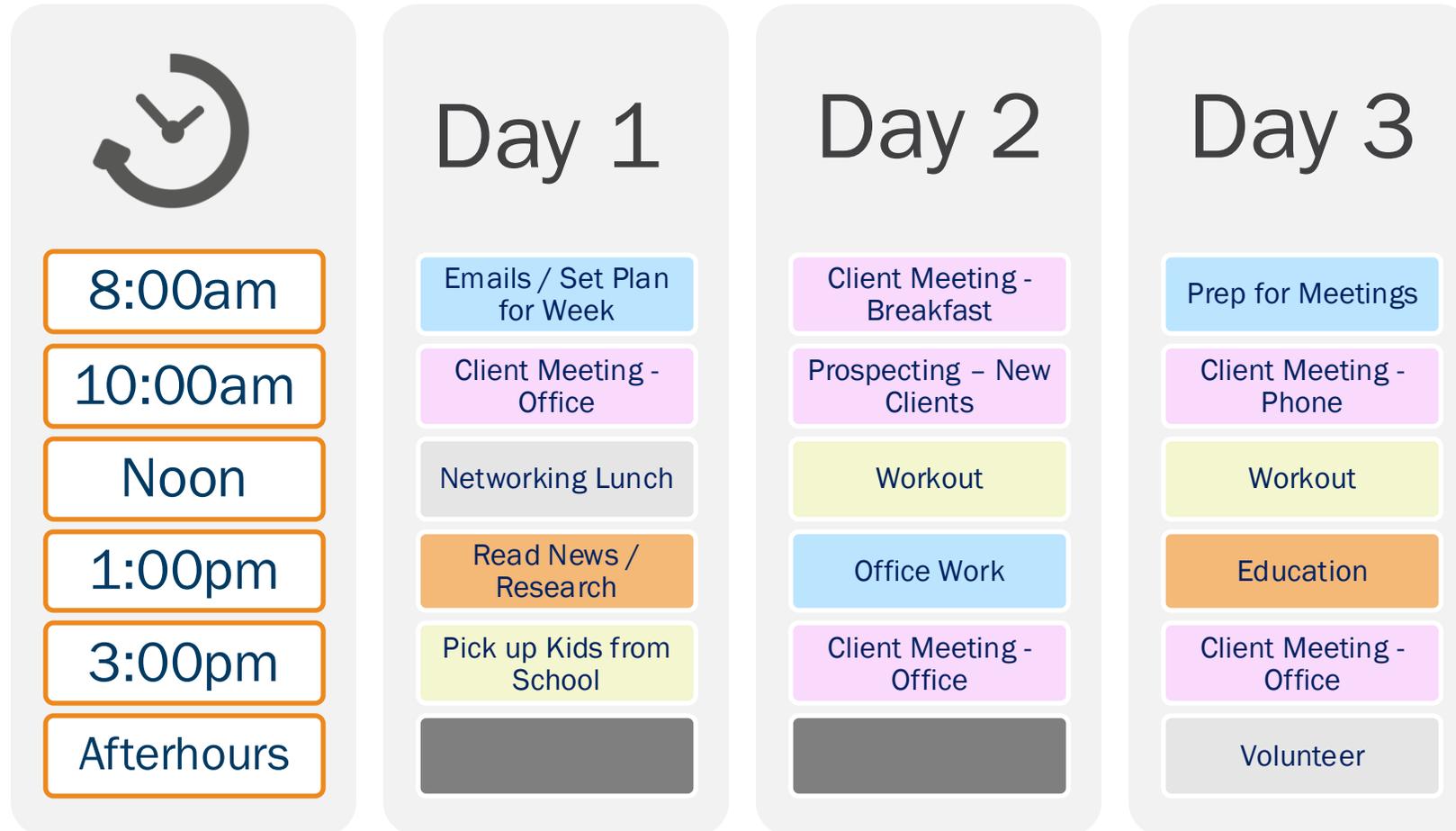
# What do you want in your Career?



**This Career  
offers a lot**



# A Day in the Life



# What can you do now?

## High School

- Classes – Business, Psych, Sociology, Economics, Math
- Extra Curricular Activities
- Explore Colleges with Degree Programs
- Job Shadow
- BestPrep's MN Business Venture Summer Camp
- Student Government
- Conflict Resolution



# What can you do in college?

## College

- Internships
- Financial Planning Degree
- Become a Member of the Financial Planning Association
- Learn how people think/behave – Psychology, Sociology
- Budget Your Money
- CFP Program



# What else can you do?

## Other Great Experiences to Consider

- Volunteer
- Part-Time Job / Summer Job
- Clubs that Foster Communication Skills
- Coach
- Tutor



# Financial Advisor Video



**Classroom Plus**

powered by  **bestprep**

# Student Survey



# Thank You!

BestPrep gratefully acknowledges the financial and volunteer support provided by the Charles Schwab Foundation to offer Career as a Financial Advisor as a part of Classroom Plus.

