



Compare Our Program

The Academy of Preferred Financial Advisors takes pride in the success their members achieve from being a part of the Exclusive Coaching Program. This program’s mission is to help its participants realize the goals they have for their practices through education based on proven systems and customized advice.

Our program is centered around time-tested systems and tools that have consistently generated results. Please take a moment to fill out this brief survey to help you identify what you may be missing in your current training system.

APFA Services

Does your coaching program:

	APFA	Your Current Program
→ help you build a comprehensive operating plan to set your practice up for success?	✓	<input type="checkbox"/>
→ help you develop and implement an entire calendar year of marketing?	✓	<input type="checkbox"/>
→ provide a full array of high-quality content for your 12-month marketing calendar?	✓	<input type="checkbox"/>
→ provide special training systems for your staff?	✓	<input type="checkbox"/>
→ keep you focused on your goals through a monthly accountability system?	✓	<input type="checkbox"/>
→ offer tax planning training from one of the most distinguished CPA’s in the country?	✓	<input type="checkbox"/>
→ provide customized advice and assistance tailored to <i>your</i> specific needs?	✓	<input type="checkbox"/>
→ have a foundation that is based on time tested, proven systems, not just theory?	✓	<input type="checkbox"/>
→ value client care and services as a key priority to the success of your practice?	✓	<input type="checkbox"/>
→ help show you not just what to do, but <i>how</i> to do it?	✓	<input type="checkbox"/>

Are you ready to take your practice to the next level?

Most advisors have the motivation to succeed – they just need a plan to implement and some guidance along the way.

If you’re looking for a comprehensive training program to help your practice excel, we’d like to help!

[I’d like to learn more about the Exclusive Coaching Program](#)

