



The Academy of Preferred Financial Advisors
partners with the industry's best -

**Are you ready to be part of the
industry's elite?**

Congratulations! You've come this far. You've realized that financial advisors who are serious about their practice need continuing education and guidance. At the Academy, we have helped thousands of advisors reach their goals. Take this brief quiz to see if the Academy is compatible with your goals and business style.

AM I READY TO TAKE MY PRACTICE TO THE NEXT LEVEL?

I would like to:

- increase my production.
- improve my client services skill set.
- improve client retention.
- broaden my overall financial planning services knowledge and expertise.
- increase prospect attraction and referrals.
- find the strengths in my practice so I can leverage these to my advantage.
- find the weaknesses in my practice so I can improve them.
- network with some of the industry's top advisors.
- increase my efficiency so I can have more personal time to enjoy life.

Yes

No

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DO I HAVE WHAT IT TAKES TO BECOME A TOP LEVEL FINANCIAL ADVISOR?

- I'm willing to go outside my comfort zone and challenge myself in order to grow.
- I'm eager to learn and implement proven techniques right away.
- I'm ready to commit to the betterment of myself and my practice.
- I'm dedicated to a "clients come first" culture in my office.
- I know that superior client service is a primary key to the success of my practice.
- I understand that the success of a company takes the entire team, not just one individual.
- I'm excited to broaden the horizons of my practice's service offerings.
- I know that achieving my dreams will require diligence and focus.
- I'm willing to invest into my future self and practice.

Yes

No

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Yes! I answered "yes" to these points!
I'm ready to start the next phase of my journey toward
growth, success and professional fulfillment.

[Discover the Academy's Exclusive Coaching Program](#)

Help! I answered "No" to some of these points.
I have some questions and could use some guidance. More
insight would be helpful to help change my answers to "Yes."

[The road to success starts with a single step!](#)