RAYMOND JAMES

Developing the next generation of Black advisors

The Advisor Mastery Program (AMP) is committed to helping change the face of financial services through its recruitment and support of advisors whose traits and unique experiences will add to the diversity of voices that make our firm stronger.

A 24-month training program, AMP is designed to engage new advisors, educate them, facilitate conversations in the classroom and in their branches with managers and mentors, and hold trainees accountable as they grow into their practices.

Learn more about how AMP helped three Black advisors make crucial connections in field.

CAMILLE YORK ADRIEN

Camille grew up seeing her father work in the financial industry but never considered a career as a financial advisor. As her own career began to blossom and she considered the possibilities, she found AMP and started her journey.

"What I loved about the AMP program was that it contained all of the components that I was looking for in a program," she said. The community she was able to create from her class of graduates still proves valuable. From swapping resources to sharing stories, it's helped her build the practice she's envisioned.

Even more, she found a community within the Black Financial Advisors Network (BFAN) at Raymond James.

"Something that was really important to me was that inclusion was a priority to the firm, and I found that to be true at Raymond James," she said. "I think representation is imperative to understand that there are those who have gone before you who have been successful – it gives you a blueprint to know that you can do it too. I wanted a firm that understands that you may have unique challenges, circumstances and perspectives and they are willing to listen, understand and adapt for those things."

TERRANCE DEDRICK

Terrance came to AMP to kick-start his career after being a collegiate athlete.

"My father has been in the industry for years, but I didn't really know the specifics of what he did. The AMP program gave me tools to start prospecting and building relationships with people to prepare to join the business," he said. "A lot of people hear the term financial advisor, but they don't know the day-to-day operations of being an advisor."

In addition to preparing Terrance for a career as a financial advisor, he was able to find a network of peers that he can connect with on a meaningful level.

"Having people that look like you, that you can bounce ideas off of, that you can talk to about some of the things you might encounter is very important. Some of the challenges that we might be going through are different from other colleagues' challenges. Having a group like BFAN to understand those challenges and talk best practices makes a big difference."

DELROY PARKINSON

Delroy had an extensive career in the financial industry, including five years as an advisor at another firm. The AMP program was just what he needed to help build a foundation for his advisory practice at Raymond James.

"Raymond James is one of the top firms in the industry, and AMP is truly a great place to begin your career," he said. "You really get to build a foundation and obtain the knowledge that you're going to need along the way. At the end of the day, coupled with inclusive networks, like BFAN, there's a wonderful support team here to help any advisor."

Delroy understands the importance of a strong infrastructure and network around your business. Now he's giving back to the next generation of advisors.

"Historically, this was not an industry available to folks like myself. I believe Raymond James understands this and is doing its part to remedy that situation," Delroy said. He is paying it forward by mentoring other Black AMP participants as they embark on their own career journey. And that is what the program is all about.

THE PILLARS OF AMP

The AMP curriculum goes remarkably deep into the concepts of advising and growing a business, giving trainees the opportunity to excel in the fundamentals while allowing mentors and managers to identify and help shape potential successors.

1. DISCOVERY

Trainees are instructed how to ask clients and prospects the right questions to understand their needs, gaps and goals.

2. CREATING A FINANCIAL PLAN

Using Goal Planning & Monitoring software, trainees are taught how to engage the client in creating a financial plan they can own and be active in.

3. THE CLIENT EXPERIENCE PROCESS

Trainees learn how to use a series of meetings – connection, clarity, strategy – to build stronger client relationships based on mutual trust.

To learn more about AMP, visit **raymondjamesAMP.com**
or contact one of our AMP recruiters at **AMPrecruiting@raymondjames.com**.

RAYMOND JAMES®

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