



# Financial Advisor Career Path

## In-house Trainee Financial Advisor

Year One  
O.T.E  
€50,000

Monetary target from Quarter 2

### 1 Quarter one training

- History of IPF
- Our market
- Public Sector pensions
- AVC's overview
- Principles of factfinding
- Sales techniques
- Software training
- Diary management.

### 2 Quarter two training

- One-to-One consultations
- Principles of marketing
- Business relationship management
- Quality control
- Paperwork processing
- Consultation training.

### 3 Quarter three training

- Compliance
- Consultative sales techniques
- Group meetings
- Building a business book
- Consultation listen-ins & feedback.

### 4 Quarter four training

- Business development
- Consultation listen-ins & feedback
- Prospecting & referrals
- Area development
- Further product training.

## Financial Advisor

Year Two:  
O.T.E €60,000  
Year Three:  
O.T.E €70,000

### 1 Stage one training

- Timeplanning
- Retirement Glidepath
- Case studies
- Saving & Investments
- Listen Ins
- RPA 1.

### 2 Stage two training

- Managing commission stream
- Inheritance Tax planning
- Wealth Management
- Tax thresholds & reliefs
- Investment Funds
- RPA 2.

## Senior Financial Advisor

O.T.E €120,000+

Once you qualify through our six step programme, you will progress to the role of Senior Financial Advisor.