RAYMOND JAMES

Developing the next generation of LGBTQ+ 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 advisors who are members of the LBGTQ+ community and the Raymond James Pride Financial Advisors Network (PFAN), set up their careers for success.

SHARON DUNAWAY-ALT

Sharon was interested in becoming an advisor from the moment she started as an assistant to her financial advisory team – that was always her plan. She came to the group with a decade of experience as a paralegal but was looking for a second career in a new industry.

"The AMP program paved the way for me," she said. "It gave me the knowledge of what a day in the life of an advisor looks like."

Also important to Sharon's decision to join Raymond James and grow her career were the programs that made her, a member of the LBGTQ+ community, feel like she belonged.

"It's always been really important for us to be our true selves because it's a better way for us to serve our clients and our relationships. Having Raymond James behind us and seeing our team being open has brought us a lot of business. It's really helped our clients who had to be closeted years ago and couldn't really talk to advisors openly. They can now bring their whole selves to meetings with their financial advisors."

HOLLY SQUICCIARINI

A third-generation advisor, Holly was attracted to the AMP program because it helped prepare her to join her family's business.

"I don't think there's anything else out there like AMP in our industry," she said. "I really enjoyed experiencing the way everyone in the cohort worked together and shared how to get better and stronger, rather than an environment where I was just functioning on my own. I was able to work with others and learn from them. The relationships I've been able to build in the company have developed out of my involvement with the program."

PFAN, which supports LBGTQ+ advisors and allies, has helped Holly realize the importance of having open and honest relationship with clients.

"Everyone deserves a seat at the table and when it comes to finances, it's important people don't feel judged – that can really develop the relationship between the advisor and client," she said. "It's a very personal one. You need to be able to open up and share exactly who you are to better understand where you want to go and what we can accomplish working together."

MEGAN MILLER

Megan became interested in exploring the advisor career path while working initially in a support role at Raymond James.

"I thought about going into an advisor role, and this program helped me take that next step," she said. "AMP truly created a road map for us on how we're going to build our business. I walked away being very excited and knowing exactly the path I was going to take and what kind of business I wanted to build."

Being part of the LBGTQ+ community, Megan also recognized the importance of being her authentic self at work and finding support from her company for overcoming challenges.

"I think companies are better with more inclusion. Raymond James walks the walk and continues to add to our Advisor Inclusion Networks (AIN). It has changed the game for me. In a professional setting, I'm building my own business, as a solo advisor, because I show up as myself. It takes on another meaning, being able to just be myself and make those connections."

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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