

Wholesaler Development Program



AWD

Association for Wholesaling Diversity



Led by the [Association for Wholesaling Diversity \(AWD\)](#) the Wholesaler Development Program is designed to equip students and recent graduates with the tools to be the best-qualified candidate for any wholesaling opportunity.

Our 12-week program is segmented into 4 weeks each of training in communications, sales and product knowledge. Each session is designed to offer 90 minutes of interactive instruction and group participation. Students will have an opportunity to showcase their acquired knowledge through post-session activities and engagement.

Over the course of 12 weeks, students will learn new skills to shape their careers, establish a mentor/mentee relationship with experienced Black professionals and develop a network that will hopefully last a lifetime. At the end of the program, students will attend a career fair with some of the best-known and most well-respected names in financial services powered by the [Coalition for Equity in Wholesaling](#).

Ready to elevate your career?

Contact ron@diversityinwholesaling.com for additional information.



Program overview:

Communication skills

Week 1

DiSC® Assessment

Everything DiSC® is built on the original, assessment-based personality profile. It gives people a common language for improving communication, adapting to other personalities and making workplace interactions more effective and enjoyable.

Week 2

Resume Writing and Interview Skills

Our Resume Writing and Interview Skills course will prepare students to present themselves as the most qualified candidate in a highly competitive market. From a resume writing perspective, we will focus on the basics, leveraging “key words” and utilizing transferable skills to overcome experience challenges.

The Interviewing Skills segment will prepare students to interview specifically in the space of wholesaling. Students will learn how to effectively prepare for interviews, communicate in a clear and concise manner, and establish best practices for securing the next interview.

Week 3

Professional Email Writing

Email communication is one of the most common forms of communication today. Even so, many neglect the importance of maintaining a professional impression within an email format. Students will learn the basics of establishing credibility by maintaining professionalism via their email communications.

Week 4

Presentation Skills

The ability to communicate confidently is a key requirement to a successful wholesaling career. Participants will be taught how to deliver clear, succinct and impactful messages that resonate with their target audience. This session will focus on improving verbal and nonverbal skills, as well as developing a method for creating action-inspiring presentations.

This session will also consist of group presentations to leverage their newly acquired skills. Participants will learn how to provide and receive feedback from their peers and coaches.

Sales Training

Week 5

Sales Process Overview

Understanding the sales process is essential to converting prospects to clients. Students will be introduced to a repeatable sales process and the core skills needed to help them navigate that process efficiently and effectively.

Week 6

Using Salesforce and Data Management

Lead generation and sales process management is essential to maximizing every sales opportunity. Participants will learn entry-level techniques and strategies to effectively manage their business via Salesforce, the world's most popular customer relationship management platform.

Week 7

Internal and External Territory Management

Territory Management is the process by which wholesalers prioritize and manage a group of prospects or existing clients. Students will learn the basics of territory management: business planning, segmentation and client service strategies.



Week 8

Guest Speakers: Wholesaler/NAM/ Relationship Manager Industry Overview

Pre-study for the Securities Industry Essentials (SIE) Exam

The guest speaker series is designed to provide participants the chance to hear directly from wholesalers covering multiple distribution channels. Students will have a chance to learn firsthand what it takes to achieve success and balance in both aspects of life.

Product Knowledge

Week 9

SIE Review Course

Participants will attend a 5-day (3 hours per day) live virtual SIE Exam Prep program. The program will be led by a CFP® professional and include live instruction with a workbook and online quizzes.

Week 10

Life Insurance 101, Annuity 101, and Retirement Plan 101

Life Insurance 101 is a key pillar in any financial foundation. Students will learn the difference between term and permanent life insurance options, as well as target markets for each solution.

In addition to learning the basics of life insurance, this course focuses on the challenges current and future investors face when planning for retirement. Participants will gain an understanding of one of the most common retirement vehicles – annuities. Students will be introduced to fixed, variable and index annuities.

Week 11

Investments 101

Introduction to Asset Management is designed to present equity, fixed income, mutual funds and ETF basics. In addition to investment basics, participants will become versed in the different channels supported by wholesalers in Asset Management.

Week 12

Presentation Skills Contest

The Wholesaler Development Program will conclude with a presentation skills contest for participants. Students will have an opportunity to showcase their newly acquired skills in front of their peers, AWD members and a collection of corporate partners consisting of some of the largest names in the financial services industry.



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