



# Driving success In your first year

Career development for  
new financial representatives

Congratulations on your decision to join Guardian as a financial professional.

By accepting the challenge to become a Guardian, you have the opportunity to improve the financial confidence of your clients and help them achieve life-long Financial Balance<sup>®</sup>.

Now, it's our turn. Over the next few months, we'll make sure that you have the knowledge, skills, processes and tools to confidently guide your new clients along their journey.

# A framework for your career development

## A path to success in your first year

We provide some of the best training and tools available, organized to help you build your practice and guide your clients' financial decisions.

## Efficient learning drives early productivity

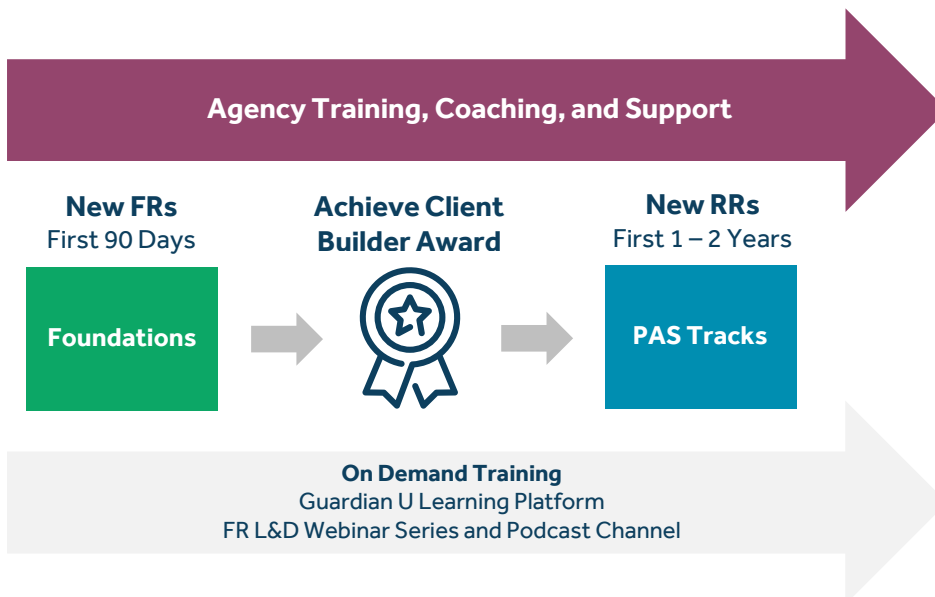
As a new FR, time is your most valuable asset. Our goal is to make your development as efficient as possible, so that you can focus on attaining your first-year income goals.

## A modern, multifaceted approach

We're committed to providing what you need, when you need it — in the way you prefer to learn.

- In-agency: Classroom training, skill-building practice and one-on-one coaching.
- Live Training: In person & virtual learning programs that provide you the development & support critical for success in your first year and beyond.
- Self-study: Guardian U is your online source for self-guided learning and resources.

## First year development: A partnership between your agency and Guardian home office



Guardian has been recognized as one of Training magazine's **Training Top 100** companies.\*



Our **Client Builder Award** honors successful FRs during their first 2 years. Winners achieved 2.5 x more productivity and are 2 x more likely to remain in the business long term.



“Training, tools and support from Guardian... have made a tremendous difference in my practice, enabling me to deliver the best possible solution to my clients.”

**Guardian FR,**  
Consolidated  
Planning  
Inc. Charlotte, NC

# Foundations: Our program for new FRs

Foundations is Guardian's blended learning experience where new Financial Representatives gain the know-how, confidence and belief system they need to get a strong start to their careers.



## LBS beliefs backed by high-activity habits

When you whole-heartedly believe in the value of the work you do, you are much more likely to succeed as a new FR. This conviction will help you persevere through the hard work necessary to generate sales during your first months on the job.

[Watch this video to learn more about Foundations.](#)

## Measurable outcomes lead to business results

Foundations helps you acquire critical skills to build a successful practice

- Find your "why"
- Maintain a positive mindset and motivation
- Approach prospects with confidence
- Conduct Philosophy and Protection Analysis Meetings
- Find more qualified people to see
- Develop effective communication and selling skills

## The first 90 days and beyond

Foundations integrates virtual and in-person learning to help you develop and apply fundamental knowledge and skills.

1

### Virtual Launch "The LBS Client Process"

Mon	Root System
Tues	Philosophy Talk and Data
Weds	Protection Analysis
Thurs	Introductions
Fri	Cash Flow Analysis

2

### Follow-Up Webinars "High Activity Habits"

1
2
3
4
5
6



### Readiness for Part 3

- Complete parts 1 and 2
- Set appointments
- Conduct Philosophy Meetings

3

### In-Person Event "Building a Successful Practice"

	Enhance Client Relationships	Expand Markets
AM	Your "Why" and Mindset	Market Focus
	Building Trust	Approach Prospects
PM	Communication and Selling Skills	Action Planning
Eve	Dinner and Networking	

# PAS Tracks



## Your track for growing an investments business

Activate growth in your investments business with PAS Tracks. Whether you're a Foundations graduate or an experienced advisor, take the next step and get comfortable with the Park Avenue Securities platform, wealth management process, and deep discovery through this 3-part, interactive series.

- Gain the confidence and skills to engage with existing and new clients regarding investments
- Implement a repeatable client process for investments that aligns with LBS
- Business results
  - Increased productivity
  - Increased client retention
  - Decreased lapse rate
  - Increased products per household

Key outcomes:	Makes sense for:
<ul style="list-style-type: none"><li>• Identify wealth planning opportunities</li><li>• Articulate value proposition and investment philosophy</li><li>• Effective client discovery</li><li>• Integrate PAS and LBS tools to apply the wealth management client process</li></ul>	<ul style="list-style-type: none"><li>• Foundations graduates with S6/S7 or IAR licensing</li><li>• Newly licensed RRs</li><li>• Any FINRA licensed advisors who do little or no investment business</li><li>• Experienced licensed advisors who have successful protection-based practices</li></ul>

### Continuous learning approach:

Foundational Knowledge	Client Process	Implement Solutions
<b>Virtual Sessions</b> <ul style="list-style-type: none"><li>• Introduction to PAS</li><li>• Investment Strategies and Concepts</li><li>• The Wealth Planning Client Process</li><li>• The PAS Platform and Resources</li></ul> <b>Self-Study on Guardian U</b> <b>Homework, Coaching &amp; Tracking</b>	<b>Workshop</b> <ul style="list-style-type: none"><li>• The Investments Client Process</li><li>• Practice Client Conversations</li><li>• Gain Confidence with Investment Concepts</li><li>• Discuss Investment Strategies &amp; Solutions</li></ul>	<b>PAS Platform, Tools, and Resources</b> <ul style="list-style-type: none"><li>• PAS Training Curriculum</li><li>• Practice Builder</li><li>• PAS Materials</li></ul>

**Questions?** Contact [FRLD@glic.com](mailto:FRLD@glic.com) for more information.

# Guardian U supports your learning

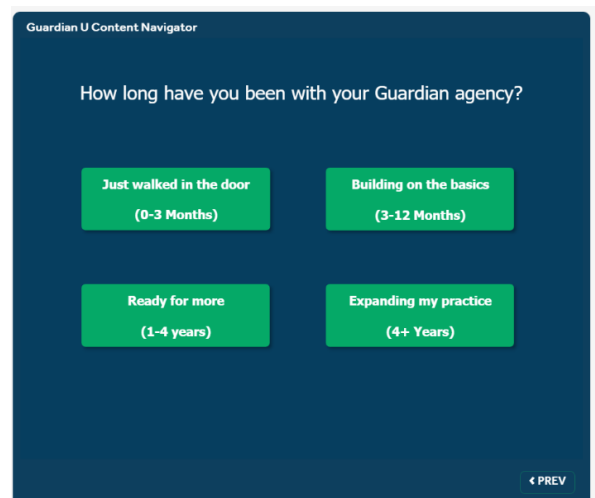
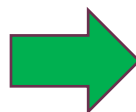
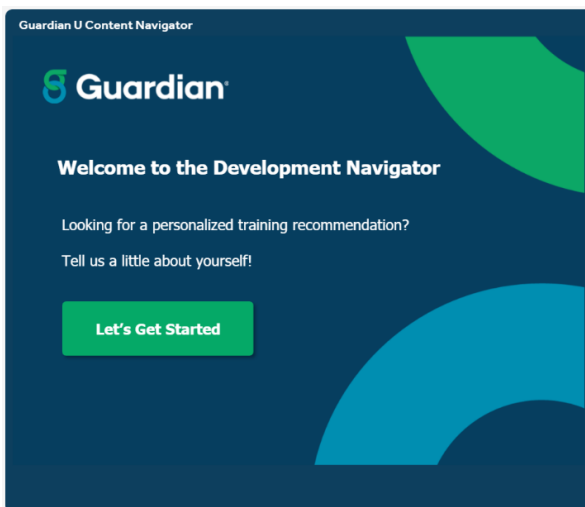
Guardian U is your online learning platform. It provides access to a wealth of training courses to help you build a successful practice and refine your skills.

A fresh, modern, and redesigned Guardian U will provide an enhanced user experience, new & streamlined training content and a customized learning journey for producers at every level of their career.

- **New interactive navigation tool creates a learning path based on where you are in your career**
- **Best in class learning content featuring The Weylman Center, Hoopis Performance Network & Industry Professionals**
- **Targeted Training by topic area**
- **Customized learning curricula served up to meet your development needs**

To access Guardian U:

- Log into Guardian Online (GOL) – <http://www.guardianonline.com>
- From the Guardian Online homepage, go to Training or Search for Guardian U





## On demand training when you need it

Available resources to help you shape and guide your career

### 1 FR L&D Webinar Series

**Live sessions with replays in case you miss it**

Throughout the year we work with our partners and your peers to deliver live webinars, covering high-activity topics. And in case you miss a session, we offer replays on our Field Webinar Series page on GOL.

[View the webinar series page on GOL to learn more.](#)

### 2 FR L&D Podcast Channel

**Training on the go**

Whether you're on the road or on the trails, you can listen in to conversations about new products, recent changes, and other important areas to focus in on.

[View the podcast instructions to subscribe and learn more.](#)

### 3 Training Catalogue

**An annual guide to Guardian's L&D programs**

A Comprehensive guide to all of the field training available at Guardian at every stage of your career.

[View the latest Training Catalogue here.](#)

### 4 Events Calendar on GOL

**An annual guide to Guardian's L&D programs**

Your real time online resource for training happening now!

[View the Events Calendar on GOL here.](#)

# Next Steps: Professional development

Taking the next steps in your career



## 1 New FR recognition

### Client Builder Award

**Client Builder Award (CBA)** recognizes the achievements of new FRs as they reach key milestones in their business. Qualifiers receive exclusive development opportunities, productivity tools and eligibility for a Guardian for Good donation to a charity of their choice.

[View the Client Builder Page on GOL to learn more.](#)

## 2 Park Avenue Securities registration

### Begin work on your Series 7 or 66 License

Obtaining your securities licenses is a critical first step in building a practice that provides comprehensive financial advice. Through Guardian's partnership with nationally recognized license exam preparation vendors, FRs can obtain their securities licenses at a discounted rate.

[View Licensing & CE on GOL to learn more.](#)

## 3 Professional designation

### Gain specialized skills that advance your career

Guardian supports FRs who pursue professional designations with vendor discounts and a comprehensive tuition reimbursement program.

To start you on your first professional designation, Guardian has partnered with The American College on a transfer of credit toward the Financial Services Certified Professional (FSCP)<sup>®</sup> for FRs who successfully complete the full 90 - Day Foundations program.

[View Designations and Tuition Reimbursement on GOL to learn more.](#)

# Partners in your success

Supporting Agency Leaders to enhance local training and keep you on the path to success



We know the key to FRs getting off to a fast start is having the support of your agency leadership.

FR Learning & Development is here to guide and support agency leaders as they focus on helping you grow and develop a successful career.

- **Calendars, lesson plans and resources** to execute training in the agency.
- **Focused agency leader support** to navigate FRs through Foundations & PAS Tracks.
- **A learning navigator path** to help agency leaders identify resources & training support.
- **Enhanced tracking capabilities** in Guardian U to help leaders effectively assign and manage training.

To learn more about the training & development available at Guardian, please reach out to our team at [FRLD@glc.com](mailto:FRLD@glc.com).

The image shows a screenshot of the Guardian U dashboard on the left and a callout window for 'Agency Leader Resources' on the right. The dashboard includes a 'Welcome Sally!' message, a 'Let's Start! Your Learning Path' button, and various resource cards like 'The Living Balance Sheet', 'Market Development', 'Sales Skills', 'Health Management', 'Product', 'Working with Business Owners', 'Practice Management', and 'Tools & Resources'. The 'Agency Leader Resources' callout window lists: 'Foundations Support', 'FR Training & Coaching', 'Guardian U Administration', and 'Leadership Development'. A blue arrow points from the 'Agency Leader Resources' section in the dashboard to the callout window.

The image shows a three-step flowchart for the Guardian U Learning Path Navigator. Step 1: 'Welcome to the Learning Path Navigator' with a 'Let's Get Started' button. Step 2: 'Tell me your role within the agency?' with buttons for 'Financial Representative (Including Pre-Contract)', 'Leadership', 'Sales Assistant', and 'Office Manager'. Step 3: 'Currently a leader? Awesome! Where do you want to continue to grow?' with buttons for 'Recruiting', 'Selection', 'Coaching & Accountability', and 'Inclusion & Diversity'. Green arrows connect the steps from left to right.





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Guardian has won the Training 125 award 2017, 2018, 2019 and 2020.

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