National Life Group®

Why Should I Consider This Career Opportunity?

You're already on the right track by considering a career in the financial services industry.

Now is the best time to start your journey as a financial advisor. Why? There are not enough advisors in the marketplace for the consumer demand, and those advisors in the marketplace are phasing out of their careers. The average age of an advisor in the industry is 57 years old.[1]

Financial Advisor is listed as a ***Top 10 Best Jobs of the Future*** according to the most recent U.S. Bureau of Labor Statistics report.[2]

Consider the Demand:

101 MM
Americans have a life insurance need-gap.[4]

53 MM
Gen Z and Millennials believe they have insufficient life insurance coverage.[4]

54%
of women do not own life insurance.[4]

Top reason for not having life insurance – they need advice (not sure how much or what type to get).[1]

The demand for individual annuities is expected to grow through 2027.[4]

The #1 financial concern for people ages 22–40 is having money in retirement and only 33% have a financial advisor.[3]

What Does It Mean To Be a Financial Advisor?

Working collaboratively with people to better understand their current needs, goals, and dreams.

Developing solutions that will **help people** with their financial needs and long-term goals.

Giving people **peace of mind** by helping to provide financial independence, protection, and a legacy.

What Is the Opportunity?

Pursuing a career in the Financial Services industry gives you endless opportunity to grow. Find your cause in purpose-filled work where you make a positive impact in people's lives.

- To build your own financial advisory practice — become a "leader" who creates economic and social value.
- Solve people's problems.
- Sense of fulfillment and ownership.
- Compensation based on your efforts.
- Lead a balanced lifestyle.
- A career path that offers the opportunity to either grow your practice or lead a team of advisors.

How Do I Learn the Business?

- Weekly classes
- New Advisor Lift-Off Program is designed to help you get off to a quick and productive start. The curriculum focuses on consultative selling skills, orientation to our products, illustration training, overview of our underwriting and new business process, etc.
- Mentors-in-residence to assist with the application of classroom training.
- Regular webinars and certification programs conducted by the Home Office.
- Opportunities to join a team of experienced advisors in established markets.
- Access to Hoopis Performance Network, the industry's preeminent digital learning platform with online courses covering selling skills, marketing techniques, product training, and planning concepts.

How Am I Compensated?

- Fixed base compensation*
- Enhanced commissions on sales of life products
- Medical benefits, 401(k) with match and pension program*
- Incentive trips, sales campaigns, and quarterly bonuses*

How Do You Help Me Launch My New Practice?

- On-going learning development via classroom and in the field.
- Guidance on developing your marketing plan.
- Access to marketing resources including social media content, brochures, e-mail templates, etc.
- An innovative broker/dealer — Equity Services, Inc. — that provides a breadth of investment products, planning tools, and support services.
- Access to an Advanced Markets Group to help with case design and consultation for more complex planning opportunities (i.e., small business owners, high-net-worth individuals, etc.)
- Guidance and tools to help you form CPA relationships with our CPA Advantage Program.
- Access to the Retirement Services Group for 403(b) and 457 plans support

Securities and investment advisory services are offered solely through registered representatives and investment adviser representatives of Equity Services, Inc. (ESI), Member FINRA/SIPC, One National Life Drive, Montpelier, VT 05604. (800) 344-7437. In CO, MO, NH and WI, ESI operates as Vermont Equity Services, Inc. ESI is a Broker/Dealer and Registered Investment Adviser affiliate of National Life Insurance Company. The title "Financial Advisor" is limited for use by investment adviser representatives.

*Subject to earnings requirements.

1 J.D. Power 2022 U.S. Financial Advisor Satisfaction Study

2 U.S. Bureau of Labor Statistics, Occupational Outlook Handbook, 2023

3 LIMRA, U.S. Individual Annuity Market Forecast Report 2023-2027, 2023

4 LIMRA, 2023 Insurance Barometer Study.

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