

# Financial Professional

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Location(s): Oklahoma City, OK / Westerville, OH

## Are you a leader who has the following traits?

- Competitive
- Entrepreneurial
- Coachable
- Ethical
- Self-disciplined
- Grit

If yes, you should consider a career as a Financial Professional at Adaptation Financial to drive positive impact in the lives of families every day. Adaptation will invest in your success from the start, training you in valuable skills such as marketing, customer relationship management (CRM), and communication, providing you home office support team and sales support to guide your success.

## Who we are...

As a legacy firm, Adaptation Financial exists to advise generations of families and business owners towards designing and protecting their legacy. Our mission is to build relationships of understanding with our clients, so we may help them adapt to the challenges they will face while guiding them towards their life goals.

## What we offer...

### Career Path Options and Benefits

**YOU** have the power to determine your own success with multiple career path options!

- Stability as a W-2 Employee: Enjoy the financial security and benefits of being an Adaptation Financial employee, including a competitive salary, full medical/dental/vision benefits, 401k Plan, and PTO Schedule.
- Opportunity to own your own business.
- Even the Opportunity to become an owner after you have started and built the foundation as an employee.

Regardless of which option is best for you. We help you achieve success—**YOU DEFINE IT.**

### Support and Resources

- Announcement letter from the firm to your natural market
- Open house/cocktail reception hosted by the firm for your professional introduction
- Personalized identify brochures

## Training and Development

- We'll equip and train you with a multi-faceted approach that includes Weylman Training Program for assistance identifying your target market based on your personal interest and background.
- Personalized coaching and training calls from experienced professionals
- 36-month training program
- Intense initial 180-day program covering the basics of sales and products
- Extended training program moving towards your CFP designation

## Products and Solutions

- Open architecture: offers advisors and clients access to a variety of carriers/products
- Accumulation Products
- Stocks, Bonds
- Mutual Funds, 529 Plans
- Life Insurance, Annuities
- Protection
- Life Insurance- 30+ Carriers
- Long Term Care Insurance
- Disability Insurance
- Retirement Plan
- 401k, Pensions, Cash Balance Plan
- IRA, Roth IRA, SEPs

## Message from the founder...

To provide a better way for clients to grow, manage and protect their assets. This is the short answer to the origin and purpose of Adaptation Financial. After more than 30 years of helping people with every type of financial situation, I learned a lot about the range of products and services out there. But I learned a lot more about people, and how everyone, without exception, is unique in their desire for financial security. The term “financial security” has a completely different meaning from person to person. I developed a simple philosophy: “the situation is the boss.” This is the starting point for me and for my entire team when we meet with a client. Once we assess your situation, we go to work helping you manage your assets and plan for the future. We don't have preconceived notions about anyone's situation, or prepackaged plans to sell. We are problem-solvers first, financial professionals second, thoroughly assessing your risk tolerance before creating a strategy that takes everything into consideration—your goals, your concerns, your needs—and works in your best interest.

## Why Adaptation Financial?

Because adaptation is a process of adjustment, of transformation. Adaptation is what you do to thrive in changing conditions. Adaptation is what we do to help you achieve success—**YOU DEFINE IT.**

Adaptation Financial knows what it takes to build a lasting business, and we want to help you build yours.

To learn more about becoming an independent advisor with Adaptation Financial, **please contact Shanon Rivera, Executive Assistant to Alan P. Niemann, CLU, ChFC, AEP at [srivera@adaptfa.com](mailto:srivera@adaptfa.com) or call 800-522-8727.**

Adaptation Financial is an Equal Opportunity Employer – M/F/Veteran/Disability/ Sexual Orientation/Gender Identity