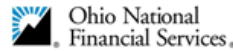




sponsored by:



HOME

PRACTICE BUILDING

LIFE INSURANCE

HEALTH INSURANCE

ANNUITIES

FINANCIAL PLANNING

SALES & MARKETING

3 Tips to get your career on the right track

🕒 July 24, 2017 👤 Elizabeth Dipp Metzger 📁 Market Insights 💬
0

Being a financial advisor is one of the most rewarding and personally fulfilling careers. You are able to help your clients navigate an increasingly complicated world of finances where more and more people struggle to understand their monetary situation. What's even more amazing is that, through your work, you can affect not only one family, but entire generations.



However, despite the fulfilling and lucrative nature of our career path, the number of female financial advisors is still quite small. With 90% of married women controlling household finances at some point over the course of a family's life, it would seem natural that female advisors would easily find success in the industry. Nevertheless, many women join the profession and quickly fall out or struggle to find their niche as a successful financial advisor.

SEARCH

SEARCH ...

BECOME A PENN MUTUAL FINANCIAL ADVISER



CATEGORIES

Annuities

Financial Planning

Health Insurance

Life Insurance

Market Insights

Polls

Practice Building

Producer Profile

Sales & Marketing

There are unique challenges in entering a field that is largely dominated by men. But we also have unique opportunities in an industry that rewards effort and production and can have fewer barriers to entry than other fields. As a woman and mother of three from the small city of El Paso, Texas, it would seem unlikely that I would have risen to the top of my industry. However, I have reached the Million Dollar Round Table's Top of the Table, which recognizes advisors with the highest level of production, for three consecutive years. I've also been included in the Top 50 producers of New York Life for over five years.

During this time, I have found several key strategies that made an important impact on my career and have boosted my success. These methods have helped guide me through a challenging industry and allowed me to best serve my clients.

Knowledge is key

One of the greatest keys to my success has been cultivating a strong knowledge of the industry. Anyone can take a test and be licensed to offer financial products, but extended, lifelong learning is a must. A client needs to understand that their advisor has the depth of knowledge necessary to address all their particular needs.

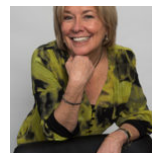
I started my career in pursuit of designations, like the CFP, since being a Certified Financial Planner holds me to a higher standard of care for my clients. I then furthered my education with a Master's Degree in Financial Services. Over the years, I've added specialties for the types of clients I serve and have also earned an AEP designation. Depending on your market, there are designations in retirement, charitable planning, and many others.

What's more important than designations is a desire to constantly learn. Educate yourself and make sure you always present your clients with the most up-to-date and progressive information possible. A large part of this can be accomplished by surrounding yourself with smart and capable people to supplement your knowledge, including lawyers, CPAs, financial planners, and investment managers that teach you and help you grow as an advisor.

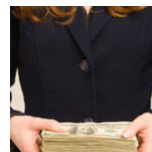
RECENT ARTICLES



POLL: Are industry designations worthwhile?
By Insurance Forums Staff



Sharon Emek: A teacher of insurance and motivator to many
By Emily Holbrook

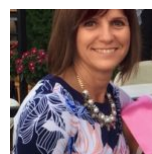


POLL: Do you earn more than your spouse?
By Insurance Forums Staff

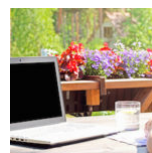


IRI's Cathy Weatherford offers a glimpse into financial struggles of women in ne...

By Emily Holbrook



Donna Alcorn: Opening doors to better protection
By Emily Holbrook



POLL: Where is your office?
By Insurance Forums Staff



There's no "I" in team
By Susan Combs

Team building

Women are often faced with challenges and obstacles simply because they are female. However, many of these challenges can also be viewed as opportunities.

Unique skills, like an affinity for team building, can build a strong foundation for your practice. Embrace your own unique skills and build off of them to bring a greater team dynamic into your client work.

When I work with my clients, I serve as the quarterback who brings the team together (CPA, attorney, CFO, etc.) to provide a unified plan. Building a strong team that plays to each individual's unique skill set allows you to deliver a plan that takes into account aspects of your client's lives you might have missed had you worked in a silo.

A strong process

The crux of all of this lies in a solid, repeatable process which we should constantly refine. This allows you to service your clients in a consistent way and makes you more referable. When a client knows what to expect, they will feel comfortable knowing the people they refer will receive the same quality service.

Ideally, your process should encompass the needs of the clients, regardless of their situation. Some clients need more complex planning than others, but all can be served by a thoughtful and organized process. Below is a sample of the process we use at my firm Crown, but each advisor and market is unique and requires a tailored strategy.





In the end, it is crucial that everything that you do as a financial advisor is done in service to your clients. Bettering yourself, your team, and your process helps the clients, makes your practice better and ultimately leads to greater success.

About the Author: Lizzie Dipp Metzger, CFP, AEP, is President of **Crown Wealth Strategies**, a financial services firm in El Paso, Texas that focuses on Wealth and Transfer Planning for affluent and high-net-worth clients throughout the U.S. Recognized as an expert in her field, she is a 5-year member of The Million Dollar Round Table with three Court of the Table and two Top of the Table honors.



50
SHARES

f Share

🐦 Tweet

BE THE FIRST TO COMMENT

Leave a Reply

Your email address will not be published.

Comment

Large empty text area for comment input.

Name *

Text input field for Name.

Email *

Text input field for Email.

Website

Text input field for Website.

POST COMMENT

PAGES	CATEGORIES	RECENT POSTS	RECENT COMMENTS
<p>Home</p> <p>About Us</p> <p>Contact Us</p>	<p>Annuities</p> <p>Financial Planning</p> <p>Health Insurance</p> <p>Life Insurance</p> <p>Market Insights</p> <p>Polls</p> <p>Practice Building</p> <p>Producer Profile</p> <p>Sales & Marketing</p>	<div data-bbox="831 1142 987 1255"> </div> <p>POLL: Are industry designations worthwhile?</p> <p>July 25, 2017</p> <p>0</p> <hr/> <div data-bbox="831 1520 987 1640"> </div> <p>3 Tips to get your career on the right track</p> <p>July 24, 2017</p> <p>0</p>	<p>TS TV Escorts from London on POLL: What is the favorite part of your job?</p> <p>luxury villa rentals in dominican republic on Susan Combs: Candid and determined</p> <p>Best resorts in dominican republic on POLL: What is your most effective lead generation source?</p> <p>Amber on Sharon Emek: A teacher of insurance and motivator to many</p> <p>Pendaftaran CPNS Kemenkumham on Emily Prendiville: Insurance with clarity and purpose</p>

Copyright © 2017 | WordPress Theme by MH Themes