MEMBER CASE STUDY
FPA Residency Program

FPA is My *One Connection*™ to Career Development

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About: Financial Planner at the independent, fee-only financial planning firm JW Harrison Financial Advisors in Walnut Creek, Cali.

Financial Planning Philosophy: In order to give the best possible financial advice, we need to fully understand our client's situations - this includes their most valuable relationships, their goals and ambitions, and their feelings towards those particular topics.

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Why did you find the FPA Residency Program attractive?
The chance to learn from financial planners with decades of experience (both individually and collectively) was my initial attraction to the program. Not only do they have the experiences, they are also more than willing to share the triumphs and failures from those experiences with you.

What was your experience with role playing with the mentors at FPA Residency?
Role playing with the mentors is the bread and butter of the entire Residency experience. In a matter of minutes, you can test your personal styles on the mentors and you will receive immediate feedback from financial planners who have decades of experience.

What was peer interaction like during FPA Residency?
Aside from invaluable mentorship, you have a chance to network with other financial planners in a variety of stages in their careers. While some of the participants are just getting started in financial planning, several participants attend to improve their current set of skills and experiences. In addition to meeting great minds from across the country, you have a chance to learn their strengths and work with them in complex group projects.

How did the feedback you received shape your FPA Residency experience? In your career?
When you are able to receive advice from the mentors at FPA Residency, it only takes a matter of minutes to soak up wisdom that it may have taken them decades to acquire. The immediate feedback from role playing is worth much more than the price of admission.

Did you apply the advice you received during the program to your business? If so, what specifically did you do?
Yes… in addition to the role playing and case studies, we were able to pick the brains of the mentors in relation to business and best practices. Our firm has adopted ideas from different mentors and have already benefited in our firm.

What program attributes do you use in your career today?
The most difficult (and most valuable) part of our jobs as financial planners is being able to synthesize incredibly complex ideas into a few simple sentences that our clients can understand and implement immediately. There seems to always be a better way of translating ideas and the mentors were able to share how you could tailor your approach to better match your personal style.

What do you hope will be your long-term benefit of attending the program for you and your business?
As an associate (or "advisor in-training"), I'm able to comfortably jump ahead of some of my peers and expedite the process of giving eloquent financial advice to clients of all ages and situations.

What was the biggest "ah ha!" moment you had at FPA Residency?
No matter how big or complex an idea or recommendation is, there is always a simpler, more effective way to express it to your clients. Sometimes the solution is in the delivery and sometimes it is a non-verbal cue, but the presentation and mix of emotions you give to your clients are just as valuable as the actual recommendations themselves.

Did the program meet your personal professional goals?
As a young financial planner in my mid-20's, the program had immediate impact on me and my confidence. My goal was to leave FPA Residency with a new level of confidence and a new mindset for handling client concerns. My expectations for the program were met and have continued to pay off.

What advice would you give fellow FPA members who are thinking of attending?
The FPA Residency program is unlike any other event you'll attend this year. It's not a networking conference, nor will you chat with vendors about potential products for your firm. Instead, the program is more of a workshop where you'll have the chance to sharpen your individual skills in dealing with clients, their concerns, and how to handle their emotions and expectations. You'll work on existing soft skills and to learn new, more useful ones.

Do you want to have the same meaningful experience? If so, register today for the next FPA Residency event.

Learn more about Bryan Hasling's experience at:
http://www.millennialplanners.com/home/2015/11/10/fpa-residency-boot-camp-for-financial-planners