YOUR ROADMAP TO BECOMING A WHOLE FAMILY ADVISOR®

What does it really mean to be a Whole Family Advisor?

A Whole Family Advisor has the skills and training to see and serve the relevant needs of all members of the primary client's family. Additionally, a Whole Family Advisor knows that one's legacy is about so much more than the numbers, and they have the ability to move between technical expert and thoughtful advisor. Are you ready to become a Whole Family Advisor?

We crafted the following outline to help advisors navigate their path to becoming a Whole Family Advisor®. Simply put, this is our suggested roadmap of our offerings that can help you reach your client service goals. You are welcome to complete as much, or as a little, of this roadmap as you choose at any pace or in any order. If you would like to talk about what options would be best for you, contact us at academy@legacycapitals.com.

YOUR WFA ROADMAP

After our WFA training courses, you're journey as Whole Family Advisor has just begun - see below for all of the ways we support you as you aim to meet the qualitative, multigenerational needs of your clients.

1 WHOLE FAMILY ADVISOR TRAINING PROGRAM

Participants will walk away from this four course training program with a rounded knowledge of what it takes to be a Whole Family Advisor® - serving the multigenerational needs of their client-families. Advisors will gain a deeper understanding of their client base, use dynamic tools to engage their client-families, enhance their communication and interpersonal skills, and learn to design and facilitate successful multigenerational family meetings.

2 CERTIFICATION

After completing the four course training program, become a Whole Family Advisors Associate (WFAA) certified advisor. WFAA certified advisors can use this designation in their personal branding and gain access to white-labeled versions of the eight PDF-based Family Engagement Tools from the courses.

3 ELECTIVE COURSE

Continue your education beyond the core courses and complete our elective course: *Inspiring Females to Financial Confidence*

CE Credit Offerings: 3.5 CIMA®, 3.5 CPWA®, 3.5 CIMC®, 3.5 RMA®, 3.5 CFP®

4 MEMBERSHIP

Become a Legacy Capitals Pro or Pro Plus Member and dive into our extensive library of resources, professional development opportunities, quarterly seminars, monthly best practices, one-on-one consultations, and more.

5 WEBINARS, COACHING, & CONSULTATION

Don't stop there. Learn more about our webinars, coaching, and consultation offerings for both your firm as well as your clients.