THE WHOLE FAMILY ADVISOR®
TRAINING PROGRAM

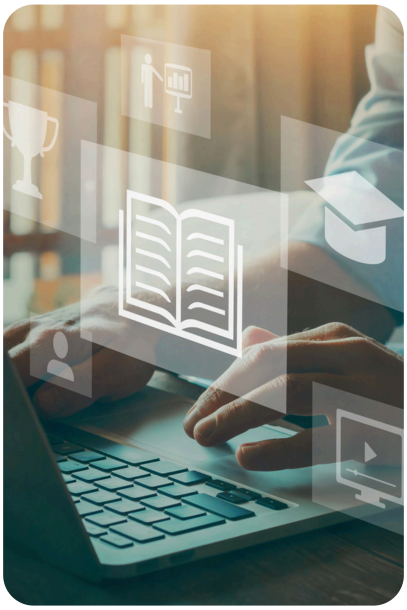
THREE WAYS TO LEARN

Learn more about the three different formats in which the Whole Family Advisor® Training Program can be delivered

Self-Paced

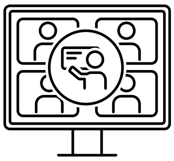
BEST FOR INDIVIDUALS

- Discounted group rate
- **100% virtual offering**
- Advisors learn at their own pace
- Approved for CE Credits



Live + Virtual

GREAT FOR FIRMS



- Discounted group rate
- **100% virtual offering**
- Nine live, virtual lectures
- Approved for CE Credits
- Access to our team of experts for virtual consultation during the engagement
- Follow up calls
- Learning community
- Customized approach to content based on participants base knowledge
- Invitations to all Legacy Capitals community events for all participants throughout the duration of the engagement

Live + Onsite

BEST FOR FIRMS

- Discounted group rate
- **In-person training - our team comes to you!**
- Approved for CE Credits
- Access to our team of experts for virtual consultation during the engagement
- Virtual group follow up calls
- Learning community
- Customized approach to content based on participants base knowledge
- Invitations to all Legacy Capitals community events for all participants throughout the duration of the engagement