Whole Family Advisor®
Training Program Timeline

GETTING STARTED: Registration & Kickoff

August 20 — Program Registration Deadline

August 27 — KICKOFF CALL | 4:00-5:00pm ET

COURSE ONE: Becoming the Whole Family Advisor®

Complete Self-Study Assignments Before Live Call 1
- Introductory Video: Your Opportunity
- Watch TedTalk Video
- Read the Whole Family Advisor® article
- Read Chapter 1 & 2 from *Legacy* (e-book)

September 3 — LIVE CALL 1 | 4:00-5:30pm ET

Complete Self-Study Assignments before Live Call 2
- Read the Article: *Authentic Connection with the Next Generation*
- Read the Article: *Women & Wealth*

September 17 — LIVE CALL 2 | 4:00-5:30pm ET

Complete Becoming the Whole Family Advisor® Assessment
- Fill out the CE request form to apply for CFP or CPWA credits

COURSE TWO: Family Engagement Tools

Complete Self-Study Assignments Before Live Call 3
- Article & Video: Introduction to the Genogram
- Watch the video: Three Circle Model of Family Business

October 1 — LIVE CALL 3 | 4:00-5:30pm ET

Complete Self-Study Assignments Before Live Call 4
- Complete Live Call 3 Assignment & Exercises

October 15 — LIVE CALL 4 | 4:00-5:30pm ET

Complete Self-Study Assignments Before Live Call 5
- Complete Live Call 4 Assignment & Exercises

October 29 — LIVE CALL 5 | 4:00-5:30pm ET

Complete Self-Study Assignments Assignments
- Complete Live Call 5 Assignments & Exercises

Complete Family Engagement Tools Assessment
- Fill out the CE request form to apply for CPWA credits

COURSE THREE: Essential Skills

Complete Self-Study Assignments Before Live Call 6
- Read the Article: The Changing Role of the Financial Planner
- Read "Hand of Cards" Chapter from *In Three Generations* (e-book)

November 12 — LIVE CALL 6 | 4:00-5:30pm ET

Complete Self-Study Assignments Before Live Call 7
- Watch Video: Brene Brown on Empathy
- Read the Article: EI + IQ = The Whole Family Advisor

November 19 — LIVE CALL 7 | 4:00-5:30pm ET

Complete Essential Skills Assessment
- Fill out the CE request form to apply for CFP or CPWA credits

COURSE FOUR: Multigenerational Family Meetings

Complete Self-Study Assignments Before Live Call 8
- Read the Article: How the WFA Creates Successful Family Meetings
- Read "Butterfly Trust" Chapter from *In Three Generations* (e-book)
- Listen to the Podcast: Successful Family Meetings Parts I, II, and III
- BONUS: Tips for Facilitating Virtual Family Meetings

December 3 — LIVE CALL 8 | 4:00-5:30pm ET

Complete Self-Study Assignments Before Live Call 9
- Watch Video: Family Profiles

December 10 — LIVE CALL 9 | 4:00-5:30pm ET

Complete Multigenerational Family Meetings Assessment
- Fill out the CE request form to apply for CFP or CPWA credits

GRADUATION from WFA Training Program

Graduation: Gain Access to Certification & Membership