

BAR Financial Customized Advisor Offerings



Training Modules	
New Representative Induction Trainings - FID/FAD	Compliance & Paperwork
Client Review Process	Docupace Rep Training
Client Tiered Services	Product Awareness
Advisory	Prospecting & Marketing
Financial Planning	SmartWorks/Technology
Insurance Review	

In Person Meetings	
Annual Kick Off	Annual Sales & Compliance Conference
Quarterly Meetings (Regional)	Special Topic Meetings
Annual Business & Goal Planning	Business/Gap Analysis
Succession Planning	

Conference Calls & Webinars	
Monthly Sales Assistant Call	Monthly Annuity Call
Leadership Council	Technology Trainings
Special Topic Trainings	Docupace Trainings
Monthly Marketing Webinar (provided by Cetera)	

Customized Marketing Offerings	
Brand Guidance & Development	Graphic Design Services
Personal Website Set Up	Timely Client Events & Seminars
Targeted Marketing Campaigns	Newsletters
Direct Mail Campaigns	Social Media Training & Coaching