

The Tarkenton Edge: Advisor Mentorship

This Program is designed to empower TF advisors by offering personalized development by Top Producer Bryan Waites, real-world application training, and proven strategies to enhance client engagement and FIA & IUL case success.



90 Day Intensive Mentorship

Ideal For: Advisors newer to the FIA and FIUL space or those seeking structured, foundational mentoring with accountability and guided progression.

- **Duration:** 12 weeks (3 months)
- **Format:** Weekly 60-minute coaching sessions (virtual)
- **Curriculum includes:**
 - Client acquisition strategies
 - Discovery & fast-finding techniques
 - Sales process optimization
 - Product training (annuities, life insurance, etc)
 - Presentation & closing skills
- **Access to:**
 - Custom scripts & email templates
 - CRM/marketing automation best practices
 - Sales call reviews & role-playing

Investment:

- **Cost:** \$900 for the full program (or \$300/month)
- **Optional add-ons:** Personalized branding support, custom case design walkthroughs

Contact your marketer to discover which package may be best for you and get started today!

Application Split Commission Program

Ideal For: Advisors already meeting with clients and needing expert mentorship to maximize case outcomes.

- **No upfront cost - performance based**
- **Criteria to Apply:**
 - Must have an active client base
 - Must be actively scheduling or running appointments
- **Mentorship Includes:**
 - Appointment prep and follow-up support
 - In-meeting coaching (live or shadowed)
 - Product recommendation consulting
 - Advanced case design collaboration
- **Compensation:**
 - Advisor and mentor split commissions on closed applications (e.g., 70/30 or customized agreement)
- **Optional Add-Ons:**
 - Sales funnel optimization
 - Lead sourcing strategy development

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On-Site Workshop + Appointment Mentoring

Ideal For: Advisors or teams seeking immersive, real-time coaching and client-facing support in a hands-on environment.

Program Structure:

- **2-Day On-Site Workshop:**
 - Day 1: Advisor attends workshop hosted by Waites Financial
 - Day 2: Real-time appointment mentoring (with client appointments, if scheduled)
- **Post-Workshop Follow-Up:**
 - 2 weeks of virtual mentorship calls for debriefing and implementation
- **Includes:**
 - Workshop materials, live role-play
 - Marketing materials review
 - In-office appointment shadowing (if permitted)

Investment:

- **Cost:** \$2,000 + travel expenses
- **Customization Available:** Tailored curriculum based on term size and goals

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