



ABACUS

How to Become a Prized Financial Planning Recruit

Abacus Wealth Partners - J.D. Bruce

Abacus Wealth Partners, LLC is a Registered Investment Advisor

DO!



Have
Flexibility



Be Creative
(NOT Boring!)



DO Use "buzzwords" to impress the interviewer.

DON'T Talk about being a little buzzed with the interviewer.

Interview
Skillfully

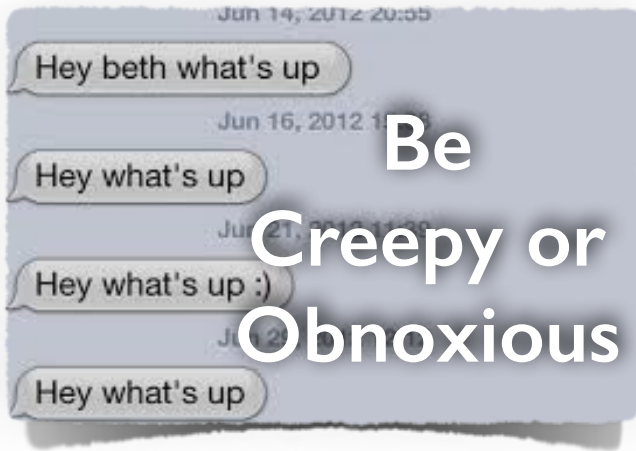


Tell
Stories

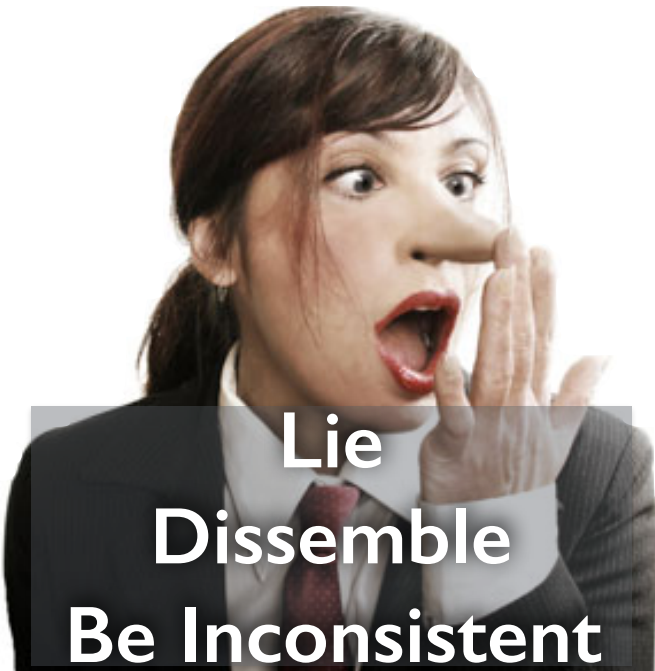
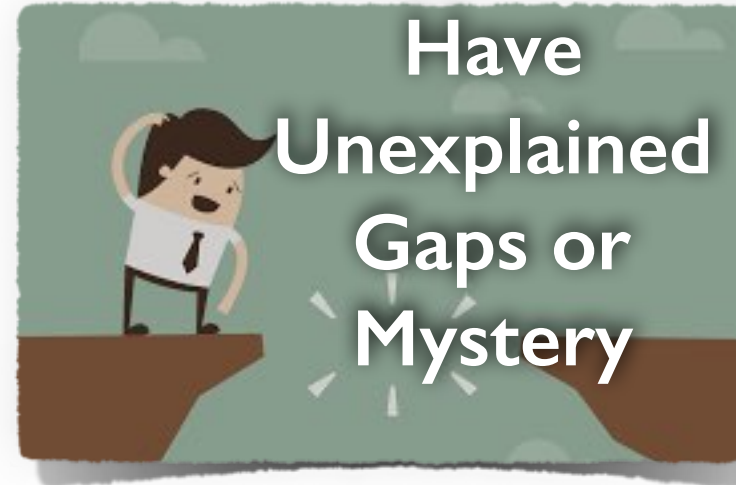


Intensively
Research
(Stalking)

Don't!



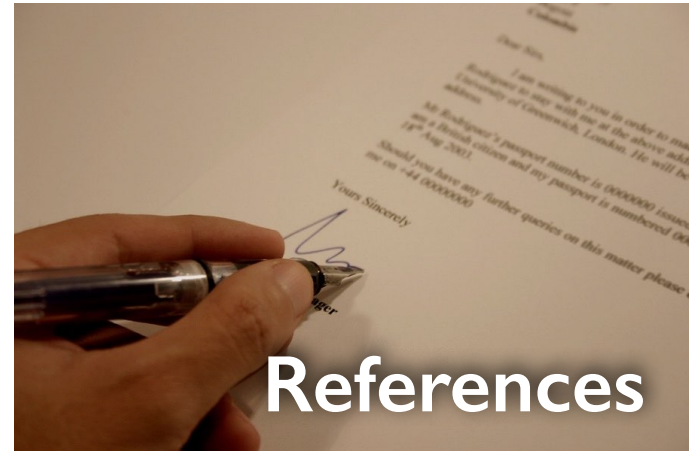
Be
Creepy or
Obnoxious



Doesn't Matter



But... Industry Knowledge and personal finance habits are critical



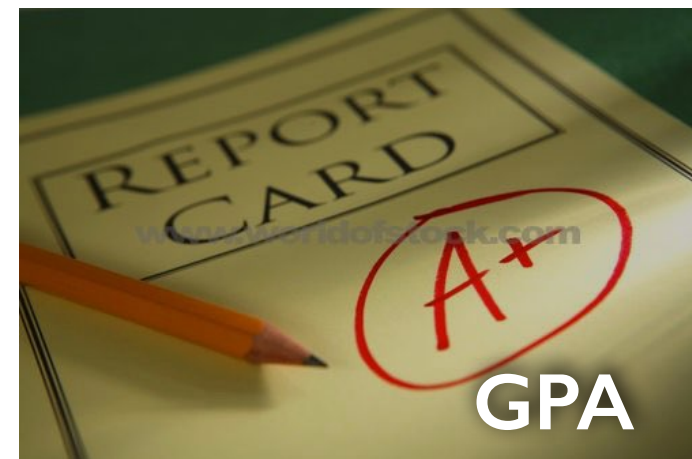
Unless... I know them



But... Education and passing exams is good



Instead... Accomplishments!



But... Intelligence matters

Summary

DO!

- ▶ Be willing to get started however you can. If you can relocate, work weird hours or part time, it makes it easier to get in the door. It's all about what's best for the team, not you.
- ▶ Be creative with cover letter, resume and anything you send. Presentation skills matter a lot.
- ▶ Tell stories about moments in your experience, not your entire life history.
- ▶ Intensively research every firm you interview with. Read every word on the website, every bio, every news article you can find...
- ▶ Interview with skill. That means:
 - Dress with respect. One step more professional than the interviewer, but no more.
 - Personal grooming is important. Avoid strong scents, revealing clothing, messy hair, rumpled clothing, weird parcels.
 - Be on time. Not early or late.

Don't

- ▶ Don't be obnoxious or creepy. That means you shouldn't email blast multiple people at the firm, badger people about getting a response, or FedEx a paper copy of your resume if that's not the described process.
- ▶ Don't send a generic resume with no cover letter. Cover letters and resumes should be personal and customized for each firm you apply to. Include details that show that you have researched the firm.
- ▶ Never lie, dissemble or give inconsistent answers. We want full disclosure upfront. We can forgive past mistakes, but can't forgive a lack of transparency.
- ▶ Avoid leaving mysterious gaps in your work history. Explain anything weird in the cover letter.
- ▶ Don't leave your personality at home. We have to work with you, so we want to know who you are and how you'll be day-to-day. Find a way to be confident about who you are and what you believe.

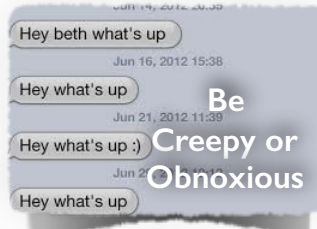
Doesn't Matter

- ▶ Too much finance work experience can be a negative. Broad and diverse work experience is often better. But make sure your personal finances are in order and you know as much as you can about the industry.
- ▶ We don't care whether you have a given certification. We know you'll get there. But, find out what certifications are important to the firm you are applying to and point out how much you've done to attain one.
- ▶ References are useless. We assume you're only going to give us people who will say good things. But, if you've worked with people I know and trust, a reference from them is golden.
- ▶ Nobody cares about your high school jobs. Leave them off the resume. If you have unusual accomplishments during your teens, those are cool.
- ▶ If I see a GPA on a resume, I assume you have zero real world experience. Instead, find a way to demonstrate your intelligence and love of lifelong learning.

DO!



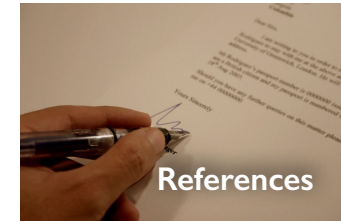
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