



Helpful tips to prioritizing your executive educational needs.

1. **Don't be afraid to self-reflect:** One difference between great leaders and mediocre leaders is a willingness to self-reflect. Identify your gaps and areas of development, create an honest outline of where you can use some help and layout a roadmap to help close those gaps. Think of ways where your firm can do better and bring new ideas to the table to better serve HNW clients.
2. **Stay connected:** Stay engaged and at the forefront of change. Stay abreast to the latest [research](#), [blogs](#) and publications making headlines in the industry.
3. **Tap into the latest thought leaders:** Listen to what other influencers in the market have to say. Take advantage of today's latest webinars and podcasts. They allow you to lean into the latest topics in real-time and allow you to keep a running pulse on shifting ideas and strategies from leading practitioners in the field. Hyperlink to [webinars](#) and [podcasts](#).
4. **Cultivate key peer relationships and networks:** Develop relationships with as many people in your industry as possible. This is important for keeping up with developments and gaining new perspectives and ideas. Conferences, knowledge centers, social media groups and association task forces are great ways to meet other like-minded people and industry peers. These connections often open doors and are vital building blocks to job opportunities, mentors and go-to resources. Consider joining our [Private Wealth Advice Community in the HIVE!](#)
5. **Attend training events & programs:** These allow you to expand your knowledge base, find solutions to problems and gain new tools and skills which you cannot be taught in-house. The focused nature, allows you to dig deeper around topics of interest too. Be sure to mark your calendars for all our [Focus On Webinars!](#)
6. **Set the standard:** Don't be afraid to push yourself out of your comfort level and go for the gold-standard by earning a certification. Earning and [advanced designation](#) gives you a voice in the boardroom and allows you to play in the big leagues. Need financial assistance? [Apply for a scholarship](#) today!

Here is a worksheet for helping you get started.

I. Self-Assessment

What is my organization doing well to meet the needs of private wealth/HNW clients?	
What are the areas of opportunity when it comes to adding value for private wealth/HNW clients?	
What would help narrow that gap?	
What outcomes would this accomplish?	
What resources are available to close those gaps?	
What investment am I willing to make to help drive change?	
When do I want to accomplish this by?	

II. Goal Setting

My HNW client related career goals include

I want to accomplish the following in the next 12-months:

III. Commitment Setting

I enjoy learning through,

- Listening to Podcasts
- Reading Blogs
- Reading Articles
- Socializing Ideas with Others
- Watching On-Demand Recordings
- Attending Webinars
- Attending Conferences
- Taking in-depth Courses
- Earning a Certification

So, I will explore:

- [The Exceptional Advisor Podcast](#)
- [Reading the *InvestmentSense* Blog](#)
- [The *Investments & Wealth Monitor*](#)
- [Visiting *The Hive Community*](#)
- [Checking out the online library](#)
- [Signing up for a Focus On webinar](#)
- [Identifying which conference I want to attend this year](#)
- [Registering for an immersive class](#)
- [Attending the next CIMA®, CPWA® or RMA® info webinar](#)

Want helping identifying the best solutions to meet your organization's professional development goals?

Contact our customer care team to help you create a roadmap to success.

Email us at customer care@i-w.org or call us at +1 303-770-3377.