MFA
Master Financial Advisor

LIMRA Talent Solutions International
Reimagined

The New MFA Series is a flexible and streamlined rebuild of the PDS 300 series, newly structured to provide the knowledge, skills, and tools for greater success at every step in a producer's career development.

Participants who earn the MFA designation:

- Master the sales process from an introduction to financial planning, through prospecting, identifying and quantifying need, and developing a solution, to closing and sustaining a long-term relationship
- Develop comprehensive practice management skills for ongoing service, vision creation, accurate recordkeeping, performance improvement, and business building
- Acquire the knowledge and skills to approach and win business clients, including fact-finding, risk management, and designing appropriate solutions
- Are eligible to apply for the internationally recognized Master Financial Advisor designation upon successfully completing MFA Levels 1 – 3

Master Financial Advisor Series
Refreshed, Modularized, and Condensed

The New Master Financial Advisor (MFA) Series reimagines the PDS 300 series to provide the foundational knowledge and holistic needs-based selling skills to win in the high-net-worth market.

New MFA Series Hallmarks

Modularized and Flexible — The MFA Series is restructured in 12 half-day modules with both self-study and facilitator-led segments that can be delivered consecutively or spread out over a series of weeks.

Blended — Each module consists of half-day prework self-learning and half-day virtual or in-person facilitator-led learning.

Virtual Delivery Ready — An enhanced virtual learning experience keeps participants engaged.

Digital Participant Guide — The interactive, user-friendly guide incorporates complete course content for easy digital access.

Designed for

- Producers who make a personal commitment to growth and development of their practices
- Experienced producers who want to sharpen and refine their competencies to provide full-service individual and small-business financial planning
- Producers who want to acquire the prestigious MFA designation as a mark of their professionalism, competence, and innovative leadership for winning in today's marketplace

Take the Next Step!

For more information on managing your practice with greater success, visit www.limra.com/mfa or contact talentsolutionsinternational@limra.com.

New Modularized Course Structure

The MFA Series includes 12 blended-learning modules. Each module includes a half-day of facilitator-led learning and a half-day of prework.

MFA Level 1 — Building a Strong Foundation (6 Modules)

In the six modules of MFA Level 1, learners begin a journey that develops their existing talents and interests into a professional competency enabling them to build a successful practice and deliver trustworthy value to their clients.

The learner is first immersed in the financial services environment — transitioning to the mindset of a financial advisor, understanding the historical and current role of advising in helping individuals achieve financial security and peace of mind, and, importantly, establishing a bedrock commitment to ethical practices.

The journey continues, laying the foundation for ongoing success on sound process planning, analysis of communication styles, an understanding of the discovery process, and effective client prospecting.

Learners are then guided through the needs-based selling process, first identifying the prospect's need, next quantifying it, and subsequently developing and presenting the appropriate solution.

This initial stage of the journey culminates in closing the business with an eye to establishing a long-term relationship — from presenting and explaining the value of the final recommendations, identifying and making the most of buying signs, handling objections, and, ultimately, gaining agreement and planning for ongoing support.

MFA Level 2 — Putting Clients First (4 Modules)

Prerequisite: Successful completion of MFA Level 1

The journey now advances learners toward sustaining their newfound skills and confidence and extending them to sound practice management and relationship management. At this stage, learners are guided to define their own vision, begin sharing it with a team, and develop and implement continuous performance improvement processes.

Focus at this point turns to consolidating gains and ensuring continued success. Learners experience how excellence in planning, problem solving, and delegation enables them to structure and build their businesses, while creating and leading a team of high-performing professionals.

MFA Level 3 —The Business Advisor (2 Modules)

Prerequisite: Successful completion of MFA Levels 1 and 2

Having come so far, learners now raise their sights higher — to serving businesses. Many skills are transferable, but new competencies are also required. Learners find out what these differences are and master how to fact find and evaluate the role of risk. They also learn new tactics for approaching business prospects, developing and implementing appropriate solutions, and building ongoing relationships.

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