

| YEAR 1  |  |        |
|---|--|--------|
| Leadership Philosophy                                   |  |        |
| Week  | Video Title  | Length |
| <b>Leadership Mindset &amp; Insights</b>                |  |        |
| 1   | A Leader's Passion For Building Others - Part One              | 7:28   |
| 2   | A Leader's Passion For Building Others - Part Two              | 5:59   |
| 3   | The Leadership Mindset   | 8:21   |
| 4   | Leadership From A Legend                                       | 9:23   |
| <b>Developing Leaders: Keys to Effective Leadership</b> |  |        |
| 5   | Enthusiasm - A Leader's Key To Attracting Others               | 6:58   |
| 6   | Overview Of The Elements Of Trust                              | 7:38   |
| 7   | Inadvertent Mistakes That Kill Trust                           | 6:07   |
|   | The Power Of Encouragement                                     | 1:59   |
| 8   | Developing Purpose In Others                                   | 10:03  |
| 9   | Getting Buy-In And Consensus                                   | 9:05   |
| 10  | The Dangers Of Sarcasm For A Leader                            | 7:14   |
| 11  | Avoid Perfectionism To Lead Others                             | 10:02  |
| <b>Time Management Concepts and Techniques</b>          |  |        |
| 12  | Understanding Time Management                                  | 9:59   |
| 13  | Time Management Concepts And Practices                         | 9:21   |
| 14  | Proven Time Management Techniques                              | 12:41  |
| <b>Creating and Delivering Your Value Proposition</b>   |  |        |
| 15  | How To Define And Write Your Value Proposition                 | 9:39   |
| 16  | Delivering Your Value Proposition                              | 9:31   |
| <b>Recruiting - Finding</b>                             |  |        |
| Week  | Video Title  | Length |
| <b>Understanding Sourcing for Potential Recruits</b>    |  |        |
| 17  | Sources For Gathering Names Of Potential Candidates - Part One | 7:13   |
| 18  | Sources For Gathering Names Of Potential Candidates - Part Two | 7:59   |
| 19  | The Observation: Approaching Candidates In Everyday Situations | 2:37   |
|   | The Personal Observation Method In Recruiting                  | 2:31   |
|   | Strategies For Successful Recruiting And Retention Culture     | 4:53   |
| <b>Developing an Ideal Candidate Profile</b>            |  |        |
| 20  | An Ideal Candidate Profile                                     | 8:26   |
| 21  | Creating An Ideal Candidate Profile                            | 6:07   |

| <b>Developing Your Message to Attract Top Performers</b>                |   |        |
|---|---|--------|
| 22  | Recruiting: Distinguish By How, Not What                              | 8:58   |
| 23  | Developing Your Messaging To Attract Future Top Performers - Part One | 10:38  |
| 24  | Developing Your Messaging To Attract Future Top Performers - Part Two | 10:38  |
| 25  | Attracting New Candidates   | 7:39   |
| 26  | Attracting Inexperienced Candidates That Are Future Stars - Part One  | 10:39  |
| 27  | Attracting Inexperienced Candidates That Are Future Stars - Part Two  | 6:54   |
|   | Recruiting Role Play: The Approach                                    | 1:43   |
| <b>Generating Advisor Referrals and Developing Centers of Influence</b> |   |        |
| 28  | Brainstorming For Recruiting Referrals                                | 3:02   |
|   | Cultivating Nominators Or Centers Of Influence                        | 5:51   |
| <b>Cultivating Potential Recruits Over Time</b>                         |   |        |
| 29  | Staying Top Of Mind With Candidates                                   | 8:54   |
| 30  | Importance Of Follow-Up When You Miss A Recruit                       | 10:01  |
| 31  | Why Keep A Candidate Profile  | 9:53   |
| <b>Recruiting and Selecting College Graduates</b>                       |   |        |
| 32  | Sourcing Recent College Graduates                                     | 8:46   |
| 33  | The Recruiting And Selection Of College Graduates - Part One          | 9:16   |
| 34  | The Recruiting And Selection Of College Graduates - Part Two          | 7:27   |
| 35  | What Attracting Millennials Can Teach Us About Everyone - Part One    | 6:41   |
| 36  | What Attracting Millennials Can Teach Us About Everyone - Part Two    | 6:44   |
| 37  | Millennials And Baby Boomers Serving Each Other                       | 6:57   |
| <b>Diversity Recruiting</b>   |   |        |
| 38  | Diversity & Inclusion: What That Looks Like Within An Organization    | 1:00   |
|   | Building Authentic Connections In Diverse Spaces                      | 4:09   |
|   | Strategies For Increasing Recruitment By Sourcing Diversity           | 5:50   |
| 39  | The Unique Needs Of Female Associates                                 | 6:57   |
| 40  | How To Attract Female Associates                                      | 6:42   |
| 41  | My Personal Journey: Attracting Women To The Industry                 | 6:38   |
| <b>Compensation and Benefits</b>  |   |        |
| 42  | Recruiting Candidates Without The Benefit Of Benefits                 | 10:39  |
| 43  | Recruiting Candidates That Do Not Need Benefits                       | 9:22   |
| <b>Recruiting - Selection</b>   |   |        |
| Week  | Video Title   | Length |
| <b>Selecting Top Performers</b>   |   |        |
| 44  | Selection Of High Quality Candidates                                  | 11:23  |
| 45  | Traits Of Top Performers - Part One                                   | 8:25   |
| 46  | Traits Of Top Performers - Part Two                                   | 7:44   |
| 47  | Traits To Identify In The Selection Process                           | 7:26   |

| <b>How to Conduct an Initial Recruiting Interview</b>                  |   |               |
|--|---|---------------|
| 48   | How To Conduct An Initial Recruiting Interview - Part One           | 9:18          |
| 49   | How To Conduct An Initial Recruiting Interview - Part Two           | 5:52          |
| 50   | The Five Handshake Rule - Part One                                  | 12:37         |
| 51   | The Five Handshake Rule - Part Two                                  | 9:55          |
| 52   | Early Warning Signs Someone Is Not A Culture Fit                    | 10:15         |
| <b>YEAR 2</b>  |   |               |
| <b>Week</b>  | <b>Video Title</b>  | <b>Length</b> |
| <b>Utilizing Reverse Selling in Selection</b>                          |   |               |
| 1  | Hiring To The Proper Mindset Of Inexperienced Candidates            | 10:08         |
| 2  | Let Them See What It Is Like  | 7:18          |
| 3  | Benefits Of Reverse Selling   | 9:26          |
| 4  | Show Me - How To Reverse Sell When Recruiting                       | 7:43          |
| 5  | You Will Be Overworked And Underpaid                                | 7:26          |
| 6  | Show Me - You Will Be Overworked And Underpaid                      | 9:16          |
| <b>How to Determine When Someone Is Not a Fit</b>                      |   |               |
| 7  | Early Warning Signs Someone Is Not A Culture Fit                    | 10:15         |
| 8  | When To Pass On A Candidate   | 8:23          |
| <b>Recruiting - Momentum Building</b>                                  |   |               |
| <b>Week</b>  | <b>Video Title</b>  | <b>Length</b> |
| <b>Understanding Onboarding and Momentum Building for New Advisors</b> |   |               |
| 9  | On-Boarding & Assimilating New Associates                           | 10:30         |
| 10   | How Managers Can Hurt The Pre-Contract Process – Part One           | 9:57          |
| 11   | How Managers Can Hurt The Pre-Contract Process – Part Two           | 7:13          |
| 12   | Momentum Building For New Inexperienced Associates - Part One       | 11:17         |
| 13   | Momentum Building For New Inexperienced Associates - Part Two       | 7:44          |
| <b>Understanding Joint Work Best Practices</b>                         |   |               |
| 14   | Importance Of Joint Field Work – Part One                           | 7:49          |
| 15   | Importance Of Joint Field Work – Part Two                           | 6:12          |
| 16   | Benefits Of Joint Field Work  | 6:57          |
| 17   | Guidelines For Joint Field Work                                     | 10:57         |
| 18   | Planning And Debriefing From Joint Field Calls                      | 9:46          |
| 19   | Show Me - Planning A Sales Call                                     | 4:59          |
| 20   | Show Me - Debriefing After A Sales Call                             | 7:33          |
| <b>Approaches to Increase Productivity</b>                             |   |               |
| 21   | The Productivity Equation   | 4:02          |
| 22   | Creating An Appointment Setting Culture                             | 7:49          |
| 23   | Running Productivity Campaigns To Boost Sales And Create Excitement | 4:02          |

| Development - Training  |  |        |
|---|--|--------|
| Week  | Video Title  | Length |
| <b>Why Advisors Typically Fail</b>  |  |        |
| 24  | Not All In: Why Advisors Fail  | 8:29   |
| 25  | The Common Denominator Of Failure: Slow Erosion Of The Fundamentals    | 6:29   |
| 26  | Why Advisors Fail: Lack Of Belief In The Product And Process: Part 2   | 4:10   |
|   | Why Advisors Fail: Lack Of Belief In Yourself                          | 3:31   |
| <b>Helping Your Advisors with Goal Setting</b>                                |  |        |
| 27  | Three Secrets To Effective Goal Setting                                | 9:01   |
| 28  | Leading Your Associates With SMART Goals                               | 9:05   |
| 29  | Two Sets Of Goals – Part One   | 7:19   |
| 30  | Two Sets Of Goals – Part One   | 9:15   |
| <b>Three Levels of Training Interaction: The COP Phase</b>                    |  |        |
| 31  | What Your Associates Want In Training                                  | 8:21   |
| 32  | 3 Levels Of Training Interaction - The COP Phase                       | 9:14   |
| 33  | Show Me - COP Activity – New Associate Not On Plan                     | 8:18   |
| 34  | Show Me - COP Talk For Accountability – 2nd Year Associate Not On Plan | 8:50   |
| <b>Planning and Debriefing Sales Appointments</b>                             |  |        |
| 35  | Benefits Of Pre-Sales Game Planning                                    | 10:38  |
| 36  | Show Me - Planning A Sales Call  | 4:59   |
| 37  | Debriefing After A Sales Call  | 10:15  |
| 38  | Show Me - Debriefing After A Sales Call                                | 7:33   |
|   | Missed Opportunity: Debriefing After Your Meeting                      | 3:25   |
| <b>Training Your Advisors on Marketing</b>                                    |  |        |
| 39  | Teaching Your Associates How To Market - Not Just Sell                 | 8:54   |
| 40  | Hiring To The Proper Mindset Of Inexperienced Candidates               | 10:08  |
| 41  | Marketing Through Client Events  | 8:47   |
| 42  | How To Use Newsletters To Grow Your Associate's Business               | 9:44   |
| <b>Developing Training - General</b>  |  |        |
| 42  | The Art Of Crafting The Role Play Exercise                             | 4:15   |
|   | Introducing A New Language To Your Sales Process And Organization      | 3:29   |
| <b>Development - Coaching</b>   |  |        |
| Week  | Video Title  | Length |
| <b>Three Levels of Training Interaction - Coaching &amp; Consulting Phase</b> |  |        |
| 43  | 3 Levels Of Training Interaction - Coach & Consultant Phase            | 6:12   |
| 44  | How To Have A Coaching Conversation                                    | 8:02   |
| 45  | Show Me - How To Have A Coaching Conversation                          | 6:50   |
| 46  | Show Me - How To Have A Consulting Meeting                             | 7:02   |

| <b>Understanding Mentoring - Intermediate</b>     |   |        |
|---|---|--------|
| 47  | Overview Of Mentoring   | 9:38   |
| 48  | Benefits Of Mentoring   | 8:52   |
| 49  | Benefits Of Reverse Mentoring                                 | 10:04  |
| 50  | How An Agency Can Support Mentoring                           | 7:45   |
| 51  | Roles And Responsibilities Of The Mentor - Part One           | 10:51  |
|   | Roles And Responsibilities Of The Mentor - Part Two           | 10:01  |
| 52  | Roles And Responsibilities Of The Mentee - Part One           | 7:04   |
|   | Roles And Responsibilities Of The Mentee - Part Two           | 9:44   |
| <b>YEAR 3</b>                                     |   |        |
| <b>Development - Coaching</b>                     |   |        |
| Week  | Video Title   | Length |
| <b>How to Conduct a Coaching Conversation</b>     |   |        |
| 1   | How To Have A Coaching Conversation                           | 8:02   |
| 2   | Show Me - How To Have A Coaching Conversation                 | 6:50   |
| 3   | Show Me - How To Have A Consulting Meeting                    | 7:02   |
| <b>Coaching Best Practices</b>                    |   |        |
| 3   | Coaching How To Lead By Example                               | 3:38   |
| <b>Tactical Strategies for Coaching Advisors</b>  |   |        |
| 4   | Coaching Advisors On What They Can Control & Influence        | 2:16   |
|   | Helping Advisors Focus On What Matters To Their Business      | 2:17   |
|   | Coaching Tactics To Help Advisors Move To The Next Level      | 2:21   |
|   | Using The 10-10-10 Model: Helping Advisors Make Big Decisions | 2:14   |
| 5   | Coaching Tactics To Help Advisors Move To The Next Level      | 13:26  |
| <b>Accountability</b>                             |   |        |
| Week  | Video Title   | Length |
| <b>Setting Expectations to Drive Behavior</b>     |   |        |
| 6   | Goethe's Creed: Expecting The Best In People                  | 2:38   |
|   | Five Disciplines Of Execution & High Performance              | 13:12  |
| 7   | Setting Expectations To Drive Behavior                        | 6:30   |
| 8   | LAMP Main Platform Expectations, Impact & Accountability      | 12:13  |
| 9   | Field Tested: The Importance Of Expecting More From People    | 13:35  |
| 10  | The Expectations Matrix                                       | 10:13  |
| <b>Accountability and Difficult Conversations</b> |   |        |
| 11  | Accountability: Ownership Vs. Consequences                    | 7:01   |
| 12  | Creating A Development Strategy For Your Leaders - Part Two   | 8:41   |
| 13  | How To Have The Hard Conversation                             | 9:30   |
| 14  | Conducting Virtual Accountability Meetings                    | 10:54  |
|   | Leveraging Your Company Values As An Accountability Tool      | 2:51   |

| Performance Indicators and the GAP Analysis Conversation |  |       |
|--|--|-------|
| 15   | Five Key Performance Indicators To Production Growth                     | 11:28 |
| 16   | Having A GAP Analysis Conversation With New Or Under Performing Associat | 10:20 |
| 17   | Show Me - GAP Analysis With New Associates                               | 6:31  |
|  |  |       |
|  |  |       |