



# SANCTUARY INSTITUTE SYLLABUS

For Emerging Trends in Wealth Management

*“The Evolution of the Financial Advisor”*

## **Three Year Program**

### **Enrollment**

- Advisor’s Growth – Identity – Business and Education Goals
- Support Group
  - Spouse
  - Best Friend
  - Mentor

### **Program Design**

Current Business Analysis, Goal Setting/Benchmarking, Subject Matter Selection, Mastery Road Map

Year 0 – Current Business

Year 1 Goals + 45%

Year 2 Goals + 45%

Year 3 Goals + 45% (Most Difficult and Rewarding Year)

### **Text/Audio Books**

- Drive by Daniel Pink
- The Corner Office by Adam Bryant
- The Power of Story by Jim Loehr
- The Future of the Professions by Richard and Daniel Susskind

### **Webinars and Podcasts**

- Sanctuary Website