There are challenges at every stage of an Advisor’s career. At National Best, we believe that by working together, we can solve those challenges.

nbADVISORS – Get your new career off the ground with nbAcademy, our career training program for Financial Professionals

nbPRODUCERS / SPECIALISTS – Develop your area of specialty and increase your income, enjoying referrals from our network of Advisors and Marketers

nbAGENCY BUILDERS – Build your Agency and increase your profit by letting our Network handle your Administration

nbLEGACY BUILDERS – Design the Succession Plan you want and get the retirement income you need using our innovative nbLegacy Builders Succession Plan.
Cindy just recently graduated with a Bachelor’s Degree in Business and is considering her career options. Her parents are professionals with good jobs however, she has seen them struggle financially and is determined not to fall into the trap of becoming a slave to her job.

Cindy is looking for a career that pays well, allows her to do something meaningful and gives her flexibility to do some travelling now and raise a family in the future. Having taken a course in Entrepreneurship, Cindy is intrigued by the idea of building her own business and is willing to work harder now, in exchange for more control of her lifestyle in the future.
ARE YOU SERIOUS ABOUT TAKING YOUR CAREER TO THE NEXT LEVEL?

Financial Advisor’s Lifeline

Asad

YOUNG AMBITIOUS PROFESSIONAL

Asad is an aspiring young professional with a interest in finance and a passion for helping people take control of their financial future. He is well-respected by his community and is supporting a young family.

Although he has experienced some success early in his career, working with friends and family, Asad is wondering how to expand his practice. He does not yet have a systematic approach to marketing, working with clients and processing business. He is thinking about going back to school to take more training and could benefit from working with a coach and mentor.

Develop Your Career and Increase Your Income

• Generate leads and increase your income with our innovative referral programs
• Use our systematized process for connecting, discovering and sharing with your clients
• Benefit from our training, coaching and mentoring programs

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TIRED OF JUGGLING

Jeff is the owner of a small AGA. He decided to start his own Agency several years ago because he loved to train and mentor new advisors. He was also looking forward to increasing his profit and having more time off.

Over the years, Jeff has seen many advisors come and go. Some have struggled to generate leads and close business, and have left the industry. Others, having learned from him, have gone on to become his competition, starting up their own agencies. On top of that, Increasing volume requirements, client demands, administrative hassles, and regulatory pressures are taking the fun out of running an agency.

Increase Your Profit and Get Back to Doing What You Love

- Share training, compliance and marketing resources with our Network of Advisors
- Expand your Agency across Canada
- Let our Network handle your administration
- Keep your Brand
- There is strength in numbers
READY TO CUT BACK

Rod is an independent insurance advisor with one of the larger MGAs in Canada. A strong personal producer with many years experience, Rod is used to relying on himself to get things done. Recently, the cold Canadian winters have him and his wife thinking about how much longer he wants to continue with his normal work week. He’s not ready to retire, but it would be nice to cut back and spend part of the year in Arizona.

Like most insurance advisors he does not have a succession plan – no one to take over his book, and not enough money of his own invested to allow him to retire yet. He’s dependent on the income his book currently provides, and doesn’t have a way out.
HEALTH CHALLENGES MAY FORCE EARLY RETIREMENT

Nathan is an independent insurance and mutual fund advisor with a small MGA in Western Canada. He is a conscientious, caring advisor and his clients are very loyal to him. Last year he was diagnosed with cancer and with his health in fragile condition, he has been unable to properly service his clients.

Uncertain about his future and needing to focus on his recovery, Nathan is thinking about selling his book of business. However, he is faced with a dilemma: he is not likely to receive much for his book as he would like and he is worried that his clients may not receive the same care and attention he used to give them.

Get the Retirement Income You Need with our nbLegacy Builder Program

- Transition your clients with confidence to graduates of nbAcademy, our career training program
- Prolong your retirement income
- Ensure your family continues to receive a stream of income even after you are gone