Resources to Help You Succeed

The Best of Both Worlds — Support and Flexibility

From your first day as a Farm Bureau Wealth Management Advisor, you'll receive continuous support and access to quality resources — enabling you to provide an exceptional client experience.

Team-Based Selling Focus

AGENTS

We have over 1,700 agents in our 14-state territory serving over 540,000 client/members with their insurance needs, including life, home, auto, business, and farm/ranch. Partnering with an agent opens your business up to endless cross-selling opportunities. Our agents are proud members of their local communities and have earned a reputation for establishing deep relationships as they work to protect their friends and neighbors. Working together, you'll both have an opportunity to provide a higher level of client service, offering greater value to clients.

ADVANCED MARKETS TEAM

Our team of in-house estate and business succession planning attorneys will be another powerful resource for your growing wealth management practice. As you work with client/members who are ready to hand the family farm or business to the next generation of owners, this team can offer advice and solutions to help craft a strategy that's fair for all parties involved.

REGIONAL FINANCIAL CONSULTANTS

Serving as a team of professionals in writing complex life and annuity business, our Regional Financial Consultants can be another valuable member of your team in the field. Working with you and the agents you serve, this knowledgeable team can help you develop and implement the appropriate life and annuity strategies of the client/members overarching financial plan.

REGIONAL MANAGERS

Regional managers are responsible for leading our team of Wealth Management Advisors. They will partner with you on joint work and serve as your local point of contact. As a front-line resource, they can give you a good idea of the market in the areas you serve. They'll also work with you and the agents in your area to cultivate client relationships.

Transition & Operational Support

WEALTH MANAGEMENT OPERATIONS TEAM

The Wealth Management Operations Team (aka Middle Office) is available via phone or email. The Middle Office provides crucial ongoing support to help you grow your practice by handling the day-to-day operations of account opening, trading, and compliance. It helps keep the processes and logistics running smoothly for advisors and agents. You'll be on a first name basis with our tenured and experienced Operations team members. Their range of services extend from answering quick questions to accessing a remote connection to your computer to assist you through a process. The Operations Team will be an integral part of your business.

ONBOARDING SPECIALIST

As you get closer to your target transition date, you will be assigned an Onboarding Specialist that will help ensure that you have key elements in place for creating a successful transition. Our dedicated onboarding staff will help you focus on the important details, including the practical aspects of mapping accounts, transferring your securities licenses, and learning more about the essential documents you'll need to fill out and general processes and procedures you'll need to follow, including payroll, technology and compliance systems. By following our step by step transition guide, our staff will help make sure that you have everything in place to be up and running on the first day of business, including business cards, stationery and your website.

LEGAL & COMPLIANCE

Our Legal & Compliance department provides proactive guidance to help you manage the day-to-day regulatory requirements of your business. They also act as a resource for legal questions as they arise.

ROYAL BANK OF CANADA (RBC)

As one of the world's leading diversified financial services companies, Royal Bank of Canada (RBC) provides clearing and execution services for our Broker Dealer & Registered Investment Advisor. Our relationship with RBC, helps us offer you the tools, technology and established processes you need to provide your clients with outstanding service.

When combined, the resources described here will help you gain key operational efficiencies so you can focus on providing your client/members with thoughtful advice and outstanding service.

INTERNAL WHOLESALER TEAM

Our wholesalers provide product and sales support to advisors via telephone and email support, as well as share investment ideas, education and product information. They also assist advisors in developing portfolios. They are able to coordinate the research and analysis of Mutual Funds and Money Managers (fee-based) offered through the external custodian platform. This role also can act as a liaison between advisors and the Wealth Management Operations team to resolve client issues/problems.

TRAINING TEAM

The Training Team will work with you to ensure you and your staff get the customized training you need as you transition and continually work with our systems. They provide online learning resources, and a variety of web-based and in-person training sessions to help you get familiar faster with our processes, platform, and procedures so you can focus on your business.

MARKETING & ADVERTISING

Our professional in-house marketing department provides designed, pre-approved materials, resources, and services for you to connect with your audience in a variety of ways. Your operation will reflect a brand whose values have endured for over 75 years. Your business will represent a commitment to integrity, trust, and service.

Support from this team includes:

- A customizable advisor website
- Turnkey marketing programs and materials
- Advertising and marketing collateral
- Sales literature
- Print and electronic direct mail resources
- Stationery packages

Leadership Access & Support

LEADERSHIP TEAM

The Wealth Management Leadership Team leads and oversees the vision for the division and are available for advisors to contact for information, guidance, and recommendations. They set the direction for the department by introducing new initiatives, innovations, and improvements for growth.

As a Farm Bureau Wealth Management Advisor, you have a unique opportunity to grow your business by partnering with local Farm Bureau agents to provide wealth management services within our existing client base. Using our "Your Future Advantage" process, you'll help client/members gain confidence that their insurance, planning and investment needs are in order. You'll also be positioned to further solidify your existing relationships by providing access to Farm Bureau's robust insurance product offering. You'll do all of this with the freedom and flexibility to build your business while enjoying the stability, support and benefits of an organization with over 75 years of proven success.

950-506 (9-18)