

Dear Potential Pacific Capital Team Member,

It is my pleasure to introduce you to Pacific Capital Resource Group, Inc. Our objective is to help individuals, families, and businesses prepare for a secure financial future. To accomplish this, we take a step-by-step approach to personal and business planning, designed to help our clients identify and address their unique goals and objectives.

Pacific Capital is a team of experienced professionals, managing the assets and guiding the financial lives of thousands of clients throughout the Pacific Northwest. We welcome the opportunity to work with you on ***The Road to Excellence!***



Kurt D. Jonson, CLU®, ChFC®, CFP®
President

Our Mission Statement

Improving the lives of our clients through disciplined, common sense planning that delivers results.

Pacific Capital's Values

- Integrity
- Professionalism
- Commitment
- Service



To see how Pacific Capital's ***Road to Excellence*** program can help you gain experience in the rewarding world of Financial Advising, please contact us today!



Pacific Capital Resource Group, Inc.

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**PACIFIC
CAPITAL**
RESOURCE GROUP, INC.

The Road to Excellence:
Pacific Capital's 2-year internship program



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The Road to Excellence: Pacific Capital's 2-year internship program

Created for university students beginning their junior year, Pacific Capital's **The Road to Excellence** program gives participants an opportunity unlike any other. Through this intensive two-year program, participants learn the skills it takes to launch a successful career in the lucrative financial advising industry.



Participants are placed on a team of peers and guided through the program by a successful, seasoned financial advisor. The first year of the program is spent learning the integral role of back-office duties and the procedures which ensure a smooth-running practice.

During this first year, participants will be assigned to an advisor at Pacific Capital to assist with financial analysis, client relations, marketing, and administrative duties. It is during the second year that participants will learn the skills necessary to begin *their own* successful financial advising career. Through training in sales, education in financial products & services, and practice management, participants will be well on their way to a successful future, whether or not they wish to look towards Pacific Capital for their new career.

Year One – Junior Year

During year one, junior year, participants will be teamed with a successful financial advisor who will teach them the importance of back-office duties, vital to the smooth operation of a successful financial advising practice.

Education

- Asset Allocation
- Morningstar
- Financial Profiles
- Net Exchange Pro
- Compliance

Practice Management

- Client Data System (CDS)
- New Business Processing and Procedures
- Pacific Capital Philosophies – Mission Statement, Producer Value Commitment, Our Values

Qualifications

- Business Administration, Accounting or Finance Students
- Cumulative GPA of at least 3.0
- Willingness to devote 2 years
 - School year: 15 hours per week
 - Summer: 40 hours per week
 - Work in our downtown Bellevue or Lake Oswego office

Benefits

- Paid internship
- Series 7 training and license
- Life and Disability Insurance training and licenses
- Internship credit
- Sales experience
- Networking opportunities
- Jumpstart a career in financial advising

Year Two – Senior Year

Year two, senior year, is spent learning the ins-and-outs of the financial products and services you may soon provide to your own valued clients.

Education

- Life Insurance Products and Needs
- Annuity Products
- Investment Products
- Disability Insurance
- Long Term Care

Sales Training

- 3 Step
- Personal Commercial
- Pacific Capital Story
- Phoning: Blitz, Referral, Target Market
- Introduction to Fact Finding
- Introduction to Plan Implementation

Practice Management

- Business and Marketing Plan



Beyond *The Road to Excellence*

After successful completion of Pacific Capital's **The Road to Excellence**, graduates will be equipped with the skills necessary to run a world-class financial advising practice. After graduation, many participants will be considered for employment and the launching of *their own* practice at Pacific Capital. Should you not wish to remain with us, we guarantee the skills you will develop will place you unmatched above all the competition.