Client Associate AWM Support Program

The Client Associate AWM Support Program is an on-line program designed for the Client Associate who supports a Financial Advisor who is introducing more Wealth Management concepts and products to their clients. This is not a CA designation program, but rather a way for Client Associates to learn advanced concepts, opportunities, and the tools available to support their Financial Advisor.

Why was the Client Associate AWM Support Program Created?	This program was designed as an optional learning program for Client Associates to learn advanced Wealth Management topics. These topics are some of the concepts that their Financial Advisors have learned through the AWM designation program. The goal is for Client Associates to recognize potential client opportunities and escalate these onto the Financial Advisors that they support.
What does the Client Associate AWM Support Program consist of?	This program consists of five on-line modules including: General Information, Estate Planning, Insurance, Retirement Accounts, and Trusts. Each module contains an introduction, tools and strategic ideas section. To assist the Client Associate, we have embedded a list of resources and an action plan worksheet within each module to ensure interaction between the Client Associate and the Financial Advisor. Both InfoNET and Forefield Advisor are resources used to connect you with the most current information. The on-line modules are optional so the Client Associate can focus on those modules specific to the teams business. Each module will take approximately one hour to complete and will show up as completed within RBC Campus.
How does the Client Associate AWM Support Program work?	This program is currently being offered to Client Associates that work with a Financial Advisor who holds the internal AWM designation. AWM Financial Advisors will be introduced to the Client Associate AWM Support Program through their Continuing Education and the AWM classes and refer their Client Associate to participate. Client Associates will complete this program through RBC Campus.

For more information pertaining to the Client Associate AWM Support Program, please contact Teresa Gostonczik at (612) 371-2371.