The Magnet Program for Financial Professionals

Powered by M Financial Group

CANDIDATE BROCHURE

Welcome

The Magnet Program, initiated by M Financial Group, is a cutting-edge professional development program designed to guide and empower you to join the next generation of top-tier financial professionals. The program embodies our 42-year heritage of pioneering financial solutions for clients. Additionally, our innovative training and mentoring methods create a blueprint to your entrepreneurial independence.

We pride ourselves on forging deep relationships with our high net worth clients and offering them exclusive financial approaches that exceed expectations. As a Magnet Financial Professional, you will enjoy connecting with people to discuss complex financial and insurance solutions, and embrace a tenacity to overcome obstacles.

Welcome to the Magnet Program

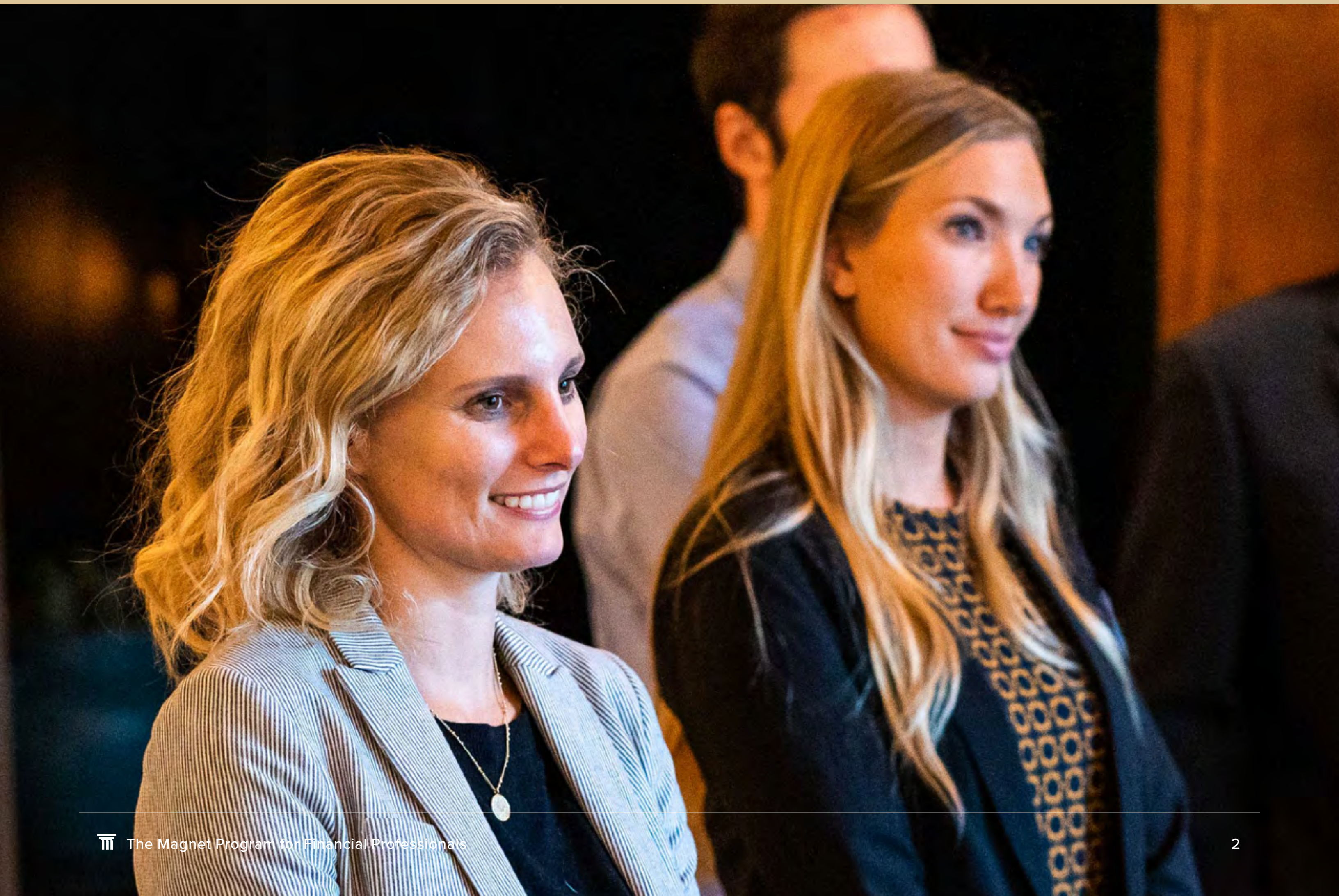
Empowered by M Financial

40+ Years
of Industry Experience

$1B+
in Annual Sales

Exclusive
Proprietary Products

Global
Community with Unrivaled Reputation



Why Choose the Magnet Program?

The Advantage

The Magnet Program is strategically designed to prepare and support top performers from across industries who strive to create lasting impacts with the work they do. Two years of the Magnet Program open the path to a lifetime of career support, valued relationships, and financial empowerment.

SUPPORT

You are supported through training, mentorship, exclusive access to proprietary insurance products and delivery solutions platforms, and an international network of Carrier partnerships with the top Insurance companies providing support for Magnet Financial Professionals. You will gain a comprehensive insider's view of our ever-evolving industry and be enabled with a suite of tailored, in-house financial products, including an accelerated underwriting platform and sophisticated marketing material that you can leverage for your high net worth clients.

"If you do what's right for clients, then your clients succeed; if your clients succeed, you succeed."

RELATIONSHIPS

At the core of M Financial and the Magnet Program is how we value our relationships – with the client and with each other.

The relationships we cultivate with our clients are never transactional. We take pride in the high standards we set for client advocacy. We listen to our clients and collaborate on a trusting, ethical, and mutually respectful journey together.

The relationships you will build through the program go far beyond clients. You will be supported by working one-on-one with a dedicated, industry leading mentor and through a peer network spanning more than 140 Member Firms.

FINANCIAL EMPOWERMENT

Financial stability matters, even while learning. You will be equipped with the freedom to control your financial gains with a performance-based earning structure that incentivizes you from the first day. The Magnet Program includes a significant base salary surpassing all industry standards throughout the two-year curriculum, with the potential of increased compensation throughout your career at an M Member Firm.

Who We Look For

M Professionals are enterprising, ambitious, and hungry for change – and we want to grow our M Community by bringing on top-performing individuals who can seamlessly integrate into an M Member Firm with high net worth individuals, corporate executives, successful entrepreneurs, and Fortune 1000 companies.

Our candidates are driven by:

- A passion to understand their client holistically
- A need to have an independent, take-charge mindset
- A desire to get more out of their profession – perhaps even a career shift
- A quest to never stop learning
- A spirit of comradery that motivates growth by learning from one another

Prior experience within the financial sector is optional, and candidates do not need to be licensed prior to their start date.

A Unique Training Program Developed from 40+ Years of Industry Experience

M Financial has always worked with the most prestigious insurance carriers to provide bespoke solutions to high net worth clients, and the Magnet Program is no different. We've collaborated with the industry's best minds and leading organizations to develop the two-year Magnet curriculum.

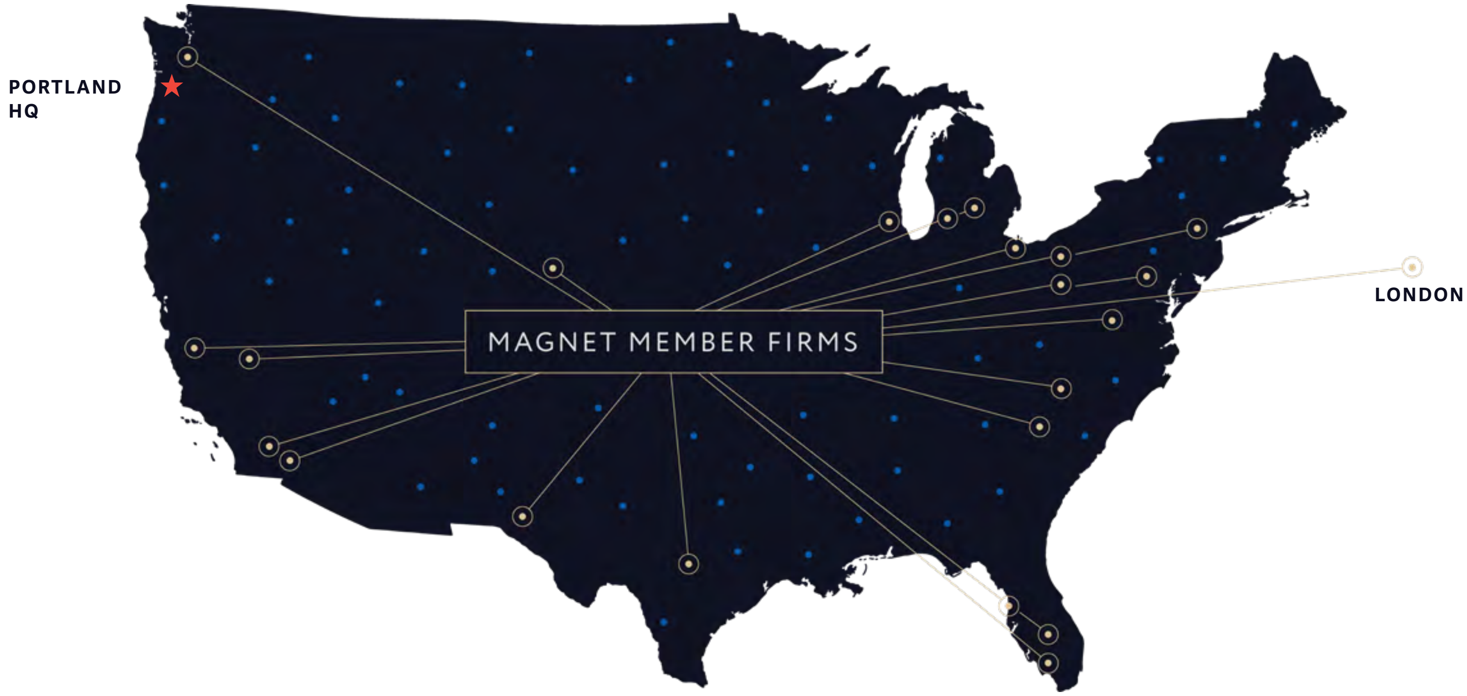
The Magnet Program offers a personalized way of training and learning that allows for candidates to gain a deeper understanding and develop the strengths necessary for success:

- **Magnet consultative sales training** with partnership from The Brooks Group, candidates will learn how to employ customized, solution-driven techniques across the sales lifecycle
- **Industry concept training** to cultivate knowledge and expertise that make Magnet Financial Professionals unique in the marketplace
- **Product training** developed with selected industry leading carriers
- **Interactive learning** consisting of e-learning, digital training sessions and onsite training in Portland with peers that enable candidates to grow in multiple learning environments
- **One-on-one mentorship** with Carriers, Firms and M Financial mentors with a history of excellence in service to not only help apply learnings into real-world applications, but also act as a support pillar through the Magnet Program and beyond

SPONSORS

PARTNERS

Where We Are Located



FAST FACTS:

Established in 1978

14B+ in combined M Financial assets

More than 140 Member Firms

Member Firms are shareholders in M Financial

Firms located across 36 states in the United States and the United Kingdom

What You'll Learn

As a Magnet Financial Professional (MFP), you'll have expert support at every step throughout the program: training, mentorship, sophisticated marketing materials, an international network of partners, and access to proprietary products and digital client enrollment and delivery solutions that gives you an immediate advantage with our high net worth clients. Your Member Firm will serve as the focal point for all your relationship-building efforts. There, you'll work one-on-one with a Firm mentor who has helped to make the business a success, and who will support your success throughout the program and your career.

The First Six Days:

You'll be invited to M Financial Headquarters in Portland, Oregon to meet your fellow cohort participants and get an in-person, in-depth picture of the program and how you'll develop the skills to build a profession that fulfills your passion for building deep relationships with your clients. You will then spend two days focusing on consultative sales training, including solution-driven techniques. Finally, during the last few days, we will focus on the technical systems, take an MFP evaluation of current skills, create a business/marketing plan, undergo professional development, and define your objectives for the next 120 days.

Curriculum Overview

The Magnet Program spans the course of two years and allows participants, regardless of previous experience, learn from the ground up and build upon that foundation to become successful financial professionals.

During the program you can expect to learn about the financial industry while gaining a deeper understanding of the M relationship cycle and learning about the different product categories such as Term Life and Disability Insurance. The program will equip you to perform policy analysis and provide tailored solutions on a client-to-client basis. At the end of the two years, The Magnet Program will prepare you to provide excellent service and recommendations of M Financial product categories that will impact the lives of your clients and your own.

Mentorship Every Step of the Way

The Magnet Program enables you to maintain constant connections with your cohort, mentor, sales manager, and M Financial team.

The program also provides excellent continuous improvement resources that allow MFP's to further their product knowledge, sales skills, marketing skills, and receive critical professional development feedback.

Succeed on Your Own Terms

Our commitment to you and what you bring to the table is here from the start. We support you with a two-year salary while you learn. Upon successfully completing the Magnet Program, we help you build a strong financial future with a compensation program that rewards you based on your performance as well as the success of your Member Firm.

Magnet Compensation Model

> **Optimizing the balance between stable compensation and commission structure to attract new financial professionals**

Compensation Value Tree

TOTAL COMPENSATION

- Base salary
- Commission
- Bonuses and incentives
- Marketing, licenses, and insurance
- Benefits

	Your Earnings Goal	Average Sales Goal	Average Commission Earned
First Year	$85,000+	$100,000	$10,000
Second Year	$100,000+	$220,000	$28,000
Third Year	$190,000+	$440,000	$116,000

Your earnings potential includes salary, commissions, and bonuses and does not reflect other benefits. Additional information and/or changes in actual performance could result in a change in the Earnings Potential. Speak with a recruiter to learn more.

Build a Pathway to Your Success

We provide a framework for expected sales performance as you progress through the program, but there are no limits—the commission you'll earn is directly tied to the effort you put in. Not only will you have all the tools you'll need to succeed long term, but you'll also have total autonomy over your compensation, and the growth of your book of business.

Diverse at Heart

While we advise our high net worth clients on sound financial solutions, we also realize the value of enriching and sustaining financial health within local communities. We place a strong focus on service and economic empowerment.

It is part of our mission to partner with organizations that empower individuals to do more, such as The Links, Incorporated, who work to help professional women of color become Magnet-trained Financial Professionals. Magnet enables these individuals to make a meaningful impact at a company where creative thinking and serving the community are valued and rewarded.

The Links, Incorporated

Linked in Friendship, Connected in Service

Spotlight

Here's what our program participants have to say about the Magnet Program.

"I feel that the vision of the Magnet Program provides excellent growth potential and the tools to be successful."

"I am most motivated when I am in front of a client. I take pride in gaining respect and trust. I love that clients do business with me because of the relationships we form."

"The biggest obstacle we have to success is ourselves. That's why having a mentor is so important. They've been there and can counsel and guide you so you can get out of your own way."

"One of the most enjoyable aspects of the Magnet Program is the Peer Network and ability to network throughout the M Community."

"I wake up every day excited to get to work. We have a big impact on our clients, and we get to see it every day."

"There are a lot of people out there that need us and need what we provide."

Interested?
Discover More About the Magnet Program

Magnet Financial Professionals are enterprising, ambitious, and hungry for change – and we want to grow our M Community by bringing more innovative business leaders, like you to the firm. You'll have the opportunity to carry on the legacy of M Financial Group, guide and grow our business, and achieve success on your own terms.

Learn more about the opportunities available at magnet.mfin.com

MAGNET

by M Financial Group™