YOUR FUTURE IS WORTH THE INVESTMENT.

GenWealth
FINANCIAL ADVISORS

Career Planning Guide

Our Mission:

We’re not looking for a copy/paste of a stereotypical “business person.” We’re looking to grow our team with people who are committed to helping our clients see real financial change. The success of our team is measured by each person’s innovative and persistent pursuit of this common goal.

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Who We Are

It's not what you think.

Forget what you think you know about financial advisors. You're probably picturing a corner office suit-and-tie guy that you can't talk to without a certain number of assets and a confidence that you've got life figured out. We don't roll that way.

Everyone deserves access to a financial plan. Our team has the heart of a teacher, meaning we're happy to help clients take the next step of their financial journey, even if it's their first. From building a budget to retirement income planning, we assist clients through multiple aspects of their financial life. Money can impact every other decision our clients face. That's why we take a holistic approach to planning for their future!

Company Highlights

- Founded in 2005
- $750 million in assets under advisement
- Offices across 3 states (Arkansas, Louisiana, Tennessee)
- Arkansas Best Places To Work 2021
- Named AMP Best Of Financial Services

We are grateful for the success we've had, and we wouldn't have the honor of these recognitions without the hard work and dedication of our incredible team. While we're proud of our accomplishments, we aren't stopping anytime soon! GenWealth is committed to continually providing excellent service to our clients and an excellent workplace for our team.

Company Culture

Since you spend so much of your life at work, it ought to be somewhere you can enjoy your time!

Every day we work together to help our clients pursue their dreams through financial independence. The dreams of our team members are equally as important! Balance is key both on and off the clock because you can't do a good job if your job is *all* you do.

We work hard so that we can spend time having fun, both as a team and during our time off. A stuffy work environment only stifles creativity and motivation (and neglecting those qualities goes against pretty much everything we believe in). If you're looking for people who can both support you in your job role and grab a drink with you for game night, you're in the right place.

Team work makes the dream work... or the mission. We each have our own strengths, skill sets, and specialties, and we're committed to working together our clients pursue financial independence.

Having the heart of a teacher starts with being a lifelong learner. The GenWealth Team is education driven, and that means having a mindset of continuous improvement. We're constantly growing, and challenging ourselves to pursue excellence for our team and our clients.

Some things just can't be taught. We're looking for something beyond a degree or a fancy designation. Each individual at GenWealth is perceptive to the needs of our clients and other team members!

The GenWealth Standard

We Know Character Matters

A foundation of integrity and respect driven by the purpose of helping others.

We Are Trail Blazers

No matter the obstacle, we don't quit. We're adaptable, innovative and persistent.

We Believe In Balance

Time is a finite resource. You can't do a good job if your job is all you do.

We Value Good Communication

It's not what you say, it's how you say it; consider the heart and other opinions even if they're different.

We Have A Unified Purpose

Team success is measured by each individual's pursuit of the common goal.

We Do Not Fear

Success is not an option if you are too afraid to fail.

We Are Life Changers

Education is our passion; it not only has the potential to change one life, but generations.

Career Paths

Financial Advisor Team

You're outspoken, a people person, and love a challenge. You think critically about how to solve problems - maybe problems that others haven't even noticed yet. It's not enough for you to know why something works, but you want a deeper understanding of how it works. If that's you, you may be a good fit for our financial advisor team!

Operations Team

Picture a person who loves the fine details (as in maybe they have a Pinterest board full of organization inspiration). Talking to this person feels like a warm hug, and they probably always have snacks and headache medicine at the ready. If that's you, you might be a great fit for our administrative team.

Marketing Team

If you have a "minor" caffeine addiction, get your best ideas at the most random times of the day, and fix unlevel picture frames even if it's in a restaurant, you may be a great fit for our marketing team!

Your Future Is Worth The Investment

Entering a new workspace can be intimidating. We're not going to just toss you a handbook, give you a checklist of tasks to learn, then tell you it's time to sink or swim. We've created GenWealth University because a great team takes time: time to learn, time to ask questions, and time to understand why we do what we do. Somewhat similar to a university experience, we'll equip you for your specific job role with different "courses" to set you up for success.

- **GenWealth Foundations**
  Weekly meetings with leadership and other new team members to help you establish a foundational understanding of GenWealth culture and practical skills to help you succeed at work and at home.

- **Study materials and dedicated study time for licensing exams**

- **Training Resources**
  Online resources accessible at any time to help build and retain an understanding of your role and responsibilities.

- **Weekly industry training for Financial Advisors**

We're education driven for more than just our clients. We're committed to helping you grow and pursue a fulfilling career!

We're pretty sure one of the worst things a company can do is tell you you're "a part of the team" and then leave you to figure it out all on your own. GenWealth University is built specifically to help us help you - because when you succeed, we succeed together.

As much as we want to see if you're a good fit for our team, we also know you should decide if we are what you're looking for. We offer multiple opportunities for you to test the waters before you jump in head first!

Internship Opportunities

As an intern, you'll play an essential role on our team as you gain financial industry experience helping team members complete projects and assisting with administrative tasks.

- Interns enter the program during their college years to gain experience, and many continue on to pursue full-time careers at GenWealth.

Job Shadowing Opportunities

Our job shadowing program is designed to give you a sneak peek into what it's like to work at GenWealth. You'll learn about the appointment process and how multiple departments work together to provide service to our clients.

4 Ways We Give Back To You

You give a lot of time and energy to your workplace, and that's not something that should be taken lightly. We appreciate the hard work of our team, and we think it's important to prove it in how we give back to you.

1

Reward and Recognize

Each quarter our team has the opportunity to earn bonuses! We also give out end-of-the-year awards to outstanding team members.

2

Time Away

Time out of the office is important to keep you refreshed when you're in the office. We offer paid vacation, health and wellness time, and family leave including maternity and paternity leave.

3

Investing In Your Future

GenWealth offers an employer match on SIMPLE contributions, as well as paid study materials and opportunities for continuing education.

4

Work Hard, Play Hard

We make sure to spend time celebrating and having fun as a team - from our annual team retreat meeting and dinner, to celebrating GenWealth's birthday, and even occasional office happy hours or game nights!

Our Leadership Team

GenWealth's diverse leadership team exists for you to have direct support in your role. Whether you need guidance, help solving a problem, or simply someone in your corner cheering you on, our leaders are well-equipped to help!

Each department has at least one representative on the leadership team, because each department is vital to the success of our business.

Kimmy James | Director of Operations

Alisha Macom | Director of Practice Development

Troy Johnson | Financial Advisor

Scott Inman | Financial Advisor

Sean Shrewsbury | Director of Marketing

Mona Khairi | Director of Compliance

Jackie Young | Director of Finance

John Shrewsbury | Ownership

Janet Walker | Ownership

Kylee Lamberger | Executive Assistant

Shannon Wood | Human Resources

GenWealth Ownership

John Shrewsbury

A career in broadcasting became the foundation for John's ability to communicate complex topics in a simple, understandable way. Today, that ability allows GenWealth Financial Advisors to deliver financial advice in a clearly defined style. Born and raised in El Dorado, John and his family moved to Central Arkansas in 1996 to build what is now GenWealth Financial Advisors. John has been helping Arkansans to develop their financial programs and plans for retirement for over two decades. He is Co-owner and Managing Principal of the firm.

Janet Walker

Co-owner, Janet Walker uses her background as a teacher and her passion for education to teach her clients about financial freedom. Although she is a native Arkansan, Janet began her financial career in Tennessee and returned to Arkansas to help build GenWealth Financial Advisors. Today, Janet works extensively with clients who are preparing for or are currently in retirement.

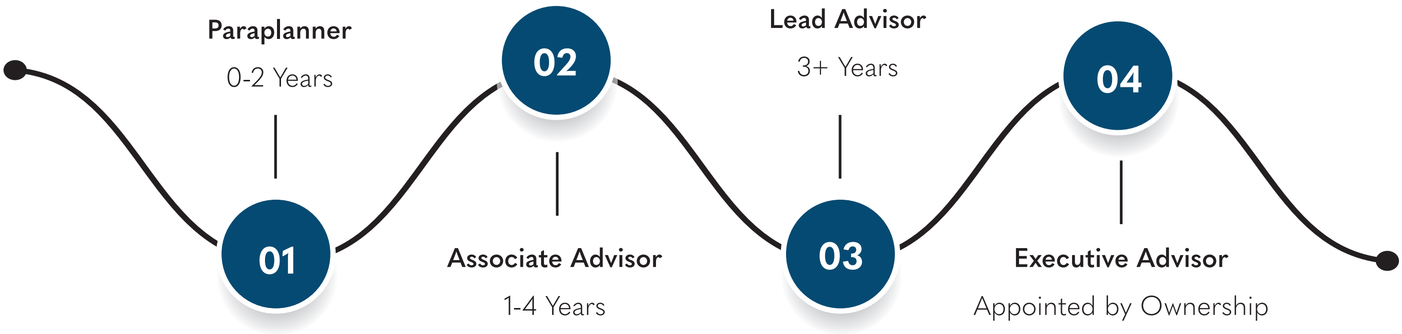
GenWealth Ownership

Kimmy James

Kimmy James joined GenWealth Financial Advisors in August 2010. She provides strong support to John Shrewsbury and Janet Walker as she works closely with the administrative team in preparing client cases and providing ongoing support. Kimmy works as an integral player on a team with our tenured advisors and our operations assistants so the advisors can offer our clients a specialized, ongoing financial planning experience.

Advisor Career Path

We're always emphasizing the importance of a plan, and your career deserves one, too. The opportunity to grow starts on your first day and extends on through years spent at GenWealth!



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Paraplanner

Our Paraplanners assist our Advisors with note taking in appointments, maintaining client data, assembling client plan documents, and more! A bachelor's degree or work experience is the prerequisite for this position, but that's not required to be industry-related.

Associate Advisor

Our Associate Advisors are fully-licensed* professionals who work with our team to draft financial planning documents, take notes in client appointments, and help present plans to prospective clients.

Lead Advisor

Our Lead Advisors are fully-licensed* professionals who also have a CFP® or RICP® license. They are able to make investment recommendations for individual clients, provide direction for financial plans, help present plans to prospective clients, and provide training or growth opportunities for Associate Advisors.

Executive Advisor

Our Executive advisors are fully-licensed* GenWealth owners who help provide direction to other advisors on financial plans and allow for coaching opportunities for the Advisor team.

*Fully-licensed refers to individuals who hold SIE, Series 7 Top-Off, Series 66, Life Insurance, and Health Insurance licenses.

Contact Us!

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