BUILD A CAREER, CHANGE LIVES

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. 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
- Over $1 billion in assets under care
- Offices across 2 states (Arkansas, Louisiana)
- Named Arkansas' Best Places To Work
- Named Best of Financial Services by Arkansas Money and Politics

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 with our clients as they 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

Excellence
Our clients and team deserve our best. Excellence is the standard, no less.

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

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

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

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

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

Character
Our foundation of integrity and respect is driven by the purpose to help others.

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 operations 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. Because we know building a great team takes time: time to learn, time to ask questions, and time to understand why we do what we do. We'll equip you for your specific job role with precise training to set you up for success.

GenWealth Foundations

Intentional 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.

During this time together, we'll cover topics like The GenWealth Standards, 8 Principles of Financial Independence and The Ideal Team Player.

Training Resources

Online resources accessible at any time to help build and retain key materials.

Dedicated Trainer

Guidance from an experienced team member tailored to your career path and needs.

Study materials and dedicated study time for licensing exams

All the tools you need to confidently complete the industry-required licensing exams for your role.

Monthly industry training for Financial Advisors

Ongoing support from experienced industry professionals to help you deepen your understanding and better serve your clients.

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. Our process 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!

Paid Internships

As an intern, you'll play an essential role on our team as you gain financial industry experience while 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.

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 parental leave.

3

Investing In Your Future

GenWealth offers a dollar-for-dollar, up to 3% of salary 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!

Pay and Perks

Pay includes benefits beyond just your paycheck! In addition to your salary, we offer:

- Employer paid short-term disability (full salary coverage during the elimination period to get to Long-Term Disability)
- Employer paid long-term disability
- 10 vacation days in year 1
- Parental leave
- Life insurance coverage
- Health insurance coverage
- Flexible Spending Account / Health Savings Account
- Voluntary policies available at employee's expense through Colonial such as additional short-term disability, dental, vision, etc.
- Variable compensation on top of base salary for Planning, Lead and Executive Advisors.

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-founder and Managing Principal of the firm.

Janet Walker

Co-founder Janet Walker used her background as a teacher and her passion for education to teach her clients about financial freedom for decades. As the business has grown, Janet has shifted her focus to using that passion to teach our future advisors how to share true financial independence with the heart of a teacher. She also takes the lead on the finances of the business and spends a great deal of time with our Leadership Team, focused on their growth and development.

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.

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.

John Shrewsbury | Co-Founder, Owner

Janet Walker | Co-Founder, Owner

Kimmy James | Director of Operations, Owner

Mona Khairi | Director of Compliance

Kylee Lamberger | Director of Business Management

Alisha Macom | Director of Practice Development

Sean Shrewsbury | Director of Marketing

Shannon Wood | Director of Team Engagement

Contact Us!

Shannon Wood

866-653-PLAN (7526)

shannon@getreadyforthefuture.com

www.getreadyforthefuture.com

We help people *discover*, *protect*, and *share* true financial independence!

GenWealth
FINANCIAL ADVISORS

Securities offered through LPL Financial, Member FINRA / SIPC. Advisory services offered through Independent Advisor Alliance. Independent Advisor Alliance and GenWealth Financial Advisors are separate entities from LPL Financial.