



VETSTEPS Job Description:

Financial Advisor Apprenticeship

Are you a Military Veteran? *Veterans who are eligible for VA Education Benefits may choose to apply for benefits while enrolled in VETSTEPS. You must supply your Certificate of Eligibility. VETSTEPS does not encumber your earned VA Benefits.*

This Professional Apprenticeship is available to any inexperienced candidate but was specially created for Veterans who wish to and are eligible to use their VA Education Benefits. It is a great way to learn how to build your own business from the ground up. You will be paired with a Financial Advisor mentor who will be your guide for the entire two-year program. VETSTEPS starts with the basics, and by the time you have successfully completed the program, you will be a fully licensed Financial Advisor with an established market that you have developed with the help of your mentor. This apprenticeship is Department of Labor and Veterans Administration approved (certificate available upon completion).

What you'll be doing:

- Work with clients to understand their goals, concerns and current financial situation. Analyze information to create a plan with appropriate strategies, to help protect and build wealth.
- Provide clients with information related to financial products and services on an ongoing basis.
- Develop and maintain a base of clients who value your input and guidance.
- Work with clients to keep their financial plans current and aligned with their life events and goals.

Why we believe you'll be successful:

- You are self-motivated, confident and have a strong work ethic; these are important skills to succeed as an entrepreneur.
- You are a person of high integrity.
- Helping people live better financial lives resonates with you.

Requirements to enter VETSTEPS:

- To enter the program, you must be Life and Health Licensed (if you do not have your license, we can help you get one prior to entering our program).
- You must pass a background check
- You must take a Career Aptitude Test
- Veterans who want to use their earned VA Education Benefits must provide a Certificate of Eligibility (COE)
- You must be a US citizen or permanent resident

Benefits:

We believe that quality people deserve a competitive benefits package. If you qualify for a Financial Representative contract with The Guardian Life Insurance Company of America (“Guardian”), associated with Consolidated Planning (you earn this contract in the first 60-90 days in VETSTEPS), you are eligible to enjoy:

- A strong benefit package, including a Defined Benefit Plan, 401(k) with Match and Roth options, health and dental insurance and more.
- High earning potential with one of the best compensation contracts in the industry that’s designed to recognize your performance.

How to Apply:

Visit <https://www.pacificadvisors.com/vetsteps> to learn more and submit your application and resume.

Pacific Advisors Company Overview

Our history dates back to 1862, with the first West-coast office of Guardian. Today Pacific Advisors serves more than 45,000 clients throughout the country. For over a century, we’ve helped protect the life, health, and wealth of our clients. And as a military veteran, you helped to protect our country. This alignment is what makes your opportunity as a financial professional with our firm so great.

Our team is comprised of more than 150 financial representatives, 2,000+ active brokers, dozens of staff, and an international network of resources and support.

We bring in-depth knowledge and understanding of tax laws, financial services, investments, insurance, and countless strategies needed to build an effective financial foundation for you. Our firm has access to a full range of investment, insurance, retirement, and enterprise products and services, which we combine into coordinated asset strategies tailored specifically to your clients’ objectives.

Pacific Advisors LLC is an Agency of The Guardian Life Insurance Company of America (Guardian), New York, NY. Securities products and advisory services offered through Park Avenue Securities, LLC (PAS), member FINRA, SIPC. OSJ: 333 N Indian Hill Blvd, Claremont, CA 91711, 909-399-1100. PAS is a wholly-owned subsidiary of Guardian. Pacific Advisors LLC is not an affiliate or subsidiary of PAS or Guardian. Insurance products offered through One Pacific Financial & Insurance Solutions LLC, DBA of Pacific Advisors LLC. Pacific Advisors LLC is not a registered investment advisor. California Insurance License #OK12914.

Many independent parties will be supporting you on this journey. The VETSTEPS Apprenticeship Program (VETSTEPS) is a Department of Labor (DOL) – approved job training program developed and solely sponsored by VETSTEPS Financial. Pacific Advisors is offering VETSTEPS in your area and will be providing you with a VETSTEPS Mentor to help guide you through the program. Your VETSTEPS Financial Apprenticeship Supervisor, in conjunction with your Pacific Advisors VETSTEPS Mentor, will supervise, monitor, and report on your development as an apprentice and your achievement of DOL-required milestones in the program to enable to you to receive your VA benefits to the extent you qualify for such benefits. Ultimately, VETSTEPS Financial will have sole discretion on whether you continue in and eventually complete VETSTEPS. Any Apprentice or Field Representative Agreement you enter into with Guardian, and related association with Pacific Advisors, can be maintained separately from your involvement in VETSTEPS. VETSTEPS Financial is not an affiliate or subsidiary of either Guardian or Pacific Advisors. VETSTEPS Financial, Guardian and Pacific Advisors are not affiliated with the DOL or the Veterans Administration.

We expect that candidates who graduate from our Training and Development curriculum fully licensed will enter into a contract with Guardian, or one of its subsidiaries, because we want you to continue your career as a Financial Advisor with us. Of course, you will have to meet the standards and requirements to be offered that contract. A Financial Advisor must be registered as an investment advisor representative with PAS providing investment advisory services. An individual cannot become a Financial Advisor or use that term with clients until meeting that criteria. Pacific Advisors is an equal opportunity employer. All qualified applicants will be considered for employment without regard to age, race, color, creed, religion, sex, affectional or sexual orientation, national origin, ancestry, marital status, disability, military or veteran status, or any other classification protected by applicable law. Contact the individual department or agency for additional information regarding your eligibility of benefits. 2020-98624. Exp 4/22.