

# It's More Than Training We Offer –

It's a true commitment to your success.



## Industry changes are frequent. Understanding them is essential.

At CUNA Brokerage Services, Inc., we know that successful investment and insurance programs start with financial advisors – and that it's critical for those advisors to stay ahead of changes in the marketplace. From Investing 101 for your support staff to advanced investment and technology courses for your advisor, our education offerings go beyond industry standards to enhance the individual experiences of your members – and to make the most of your investment program's potential.

*"I benefit greatly from CBSI training and recognition programs. They give me the foundation to see the big picture. And, I gain the insight necessary to custom-fit investments to our members' needs.*

- Frank Feng, Financial Services Representative  
Stockton, California



## CBSI advances knowledge and insight.

Why do we place so much emphasis on training and education? Because growing your investment business is easier when you heighten the awareness and insight of your staff. We believe knowledge advancement should continue throughout a career. So CUNA Brokerage Services continuously provides opportunities for networking and expansion of skill sets, including new advisor orientation, face-to-face visits with our sales managers, regional meetings, conferences and training programs, online tutorials, reward and recognition programs, and much more.

**OUR BUSINESS IS GROWING YOUR BUSINESS.**



**CUNA Brokerage Services, Inc.**  
Member FINRA/SIPC

Common Purpose. Uncommon Commitment.

## Advisor Expertise Translates Into a Better Fit for Your Members.

Our advice is as unique and personalized as your members' needs. Training allows your financial services team to understand all aspects of financial planning. Here are just a few examples of our courses:

**New Advisor Academy:** This exclusive training will energize your insurance and investment team by focusing on the development of people and technical skills necessary to win client relationships – and do it profitably.

**Honors Academy:** This educational enrichment program is customized around the needs of “seasoned” financial advisors. Participants focus on the skills required to more effectively grow their business, run their office, and take advantage of industry product knowledge.

**Practice and Wealth Management Institute:** This includes a variety of seminars for advisors. Sessions engage an industry leader and cover topics related to operational enrichment, client servicing and product incorporation and utilization.

**Investment Insights and Fundamentals:** Designed for financial sales assistants and coordinators, this is a multi-module live teleconference program. Participants gain a solid understanding of financial markets, the credit union industry, software and investment products.

**Technology Training:** CBSI provides extensive technology training to financial advisors and support staff. Designed to speed daily operations, our programs share how-to and efficiency-enhancement tips and case studies. We also complement our in-person training with online courses for advisors to enhance their skills at their own pace and schedule.

## CBSI Recognition Programs Reward Your Success.

CBSI provides multiple opportunities for peer exchange where discussions around successes, ideas, trends and approaches are constant. We've assembled superior recognition and partnership programs for advisors and programs to network, mentor and enhance each other's performance:

- *Best Practice Portal*
- *Senior Advisor Leadership Team*
- *President's Council*
- *Regional Meetings and Conferences*
- *Women of Distinction*
- *CBSI Program Advisory Panel*

## Market Updates – A Steady Stream of Knowledge.

Your financial advisors need to understand industry changes and how they impact your members. We provide timely, compelling economic webcasts from the industry's most knowledgeable sources. We consolidate the overwhelming amount of information and provide context for your investment recommendations.

Representatives are registered, securities are sold, and investment advisory services offered through CUNA Brokerage Services, Inc. (CBSI), member FINRA/SIPC, a registered broker/dealer and investment advisor, 2000 Heritage Way, Waverly, Iowa 50677, toll-free 866.512.6109. Nondeposit investment and insurance products are not federally insured, involve investment risk, may lose value and are not obligations of or guaranteed by the financial institution. CBSI is under contract with the financial institution, through the financial services program, to make securities available to members.



**We understand that strong relationships have deep roots.**

CUNA Brokerage Services is backed by the power of CUNA Mutual Group, the largest provider of financial services to credit unions.

For more than 25 years, CUNA Brokerage Services has partnered in investment, insurance and retirement planning, delivering expertise and resources that enable credit unions to fulfill dreams and deepen member relationships.

### To Learn More

Discover why CUNA Brokerage Services is the preferred broker/dealer platform for credit unions. We invite you to experience the dedication and personalization of service found only through a partner who shares your vision and passion for success.

We do more to help you grow. And we make switching easy.

Visit [www.cunamutual.com/cbsi](http://www.cunamutual.com/cbsi) or call 888.888.9716 for more information.



**CUNA MUTUAL GROUP**

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