



# Roadmap

This Roadmap is a checklist of the required elements of the Certified Wealth Strategist® program. Following this plan sequentially will take you through the entire program in approximately 4 months.

Use this roadmap to track your progress through the Directed Study portion and to pace your work on the Capstone project of the program. Specific tactics and/or Capstone items are listed next to their related components within the CWS® program of study (in red).

Plan to devote approximately 1 ½ weeks to each lesson. Completion of all lessons and mastery exams is expected before you attend the second instructor-led session on client interaction skills. **Please see completion requirements on Page 4.**

## Instructor-Led Classroom Session I

### CWS® Practice Management Skills (*Growing Your Business I*) **Tactics 1-9**

- ✓ Introduction to CWS®
- ✓ Practice Management for the Certified Wealth Strategist®
- ✓ Receive CWS® program materials 10 days after GYB I
- ✓ Receive Cannon Financial Institute LMS logon information

## Directed Study

### Prework for Directed Study **Tactics 1-9**

- Listen to Audio CD: Growing Your Business - Disc 1
- Listen to Audio CD: Growing Your Business - Disc 2
- Listen to Audio CD: Growing Your Business - Disc 4
- Listen to Audio CD: Growing Your Business - Disc 5
- Listen to Audio CD: Growing Your Business - Disc 6

### *Directed Study Begins*

#### Wealth Management: Investments

##### **Tactic 5**

- Listen to Audio CD: Growing Your Business - Disc 3
- Listen to Audio CD: The 13 Wealth Management Issues - Disc 1
- Read the *Investments* Study Guide
- Review the Concepts for Professionals References in the Study Guide
- Complete the Case Studies in the Study Guide
- Complete the Self-Assessment in the Study Guide
- Logon and Complete the *Investments* eLearning Lesson
- Logon and Complete **Investments Mastery Exam**

#### Wealth Management: Liabilities

##### **Wealth Management Issues - Items #39-41**

- Listen to Audio CD: The 13 Wealth Management Issues - Disc 4
- Read the *Liabilities* Study Guide
- Complete the Case Studies in the Study Guide
- Complete the Self-Assessment in the Study Guide
- Logon and Complete the *Liabilities* eLearning Lesson
- Logon and Complete **Liabilities Mastery Exam**

Start Date:

End Date:

Start Date:

End Date:

## Directed Study continued

Start Date:

End Date:

### Wealth Management: Insurance

#### Wealth Management Issues - Items #39-41

- Listen to Audio CD: The 13 Wealth Management Issues - Disc 2
- Read the *Insurance Study Guide*
- Review the Concepts for Professionals References in the Study Guide
- Complete the Case Studies in the Study Guide
- Complete the Self-Assessment in the Study Guide
- Logon and Complete the *Insurance* eLearning Lesson
- Logon and Complete **Insurance Mastery Exam**

Start Date:

End Date:

### Wealth Management: Executive Compensation

#### Wealth Management Issues - Items #45-47

- Listen to Audio CD: The 13 Wealth Management Issues - Disc 4
- Read the *Executive Compensation Issues Study Guide*
- Complete the Case Studies in the Study Guide
- Complete the Self-Assessment in the Study Guide
- Logon and Complete the *Executive Compensation* eLearning Lesson
- Logon and Complete **Executive Compensation Mastery Exam**

Start Date:

End Date:

### Wealth Management: Protection Strategies

#### Wealth Management Issues - Items #48-56

- Listen to Audio CD: The 13 Wealth Management Issues - Disc 6
- Read the *Protection Strategies Study Guide*
- Review the Concepts for Professionals References in the Study Guide
- Complete the Case Studies in the Study Guide
- Complete the Self-Assessment in the Study Guide
- Logon and Complete the *Protection Strategies* eLearning Lesson
- Logon and Complete **Protection Strategies Mastery Exam**

Start Date:

End Date:

### Wealth Management: QRP/IRA Distribution

#### Wealth Management Issues - Items #57-59

- Listen to Audio CD: The 13 Wealth Management Issues - Disc 3
- Read the *QRP/IRA Distribution Study Guide*
- Review the Concepts for Professionals and Critical Concerns of Estate Planners References in the Study Guide
- Complete the Case Studies in the Study Guide
- Complete the Self-Assessment in the Study Guide
- Logon and Complete the *QRP & IRA* eLearning Lesson
- Logon and Complete **QRP/IRA Mastery Exam**

Start Date:

End Date:

### Wealth Management: Business Succession Planning

#### Wealth Management Issues - Items #60-62

- Listen to Audio CD: The 13 Wealth Management Issues - Disc 5
- Read the *Business Succession Planning Study Guide*
- Review the Concepts for Professionals References in the Study Guide
- Complete the Case Studies in the Study Guide
- Complete the Self-Assessment in the Study Guide
- Logon and Complete the *Business Succession Planning* eLearning Lesson
- Logon and Complete **Business Succession Planning Mastery Exam**

## Directed Study continued

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### Wealth Management: Gifting to Children and Descendants

#### Wealth Management Issues - Items #63-65

- Listen to Audio CD: The 13 Wealth Management Issues - Disc 7, Gifting to Children/Descendant During Life section
- Read the *Gifting to Children and Descendants* Study Guide
- Review the Concepts for Professionals and Critical Concerns of Estate Planners References in the Study Guide
- Complete the Case Studies in the Study Guide
- Complete the Self-Assessment in the Study Guide
- Logon and Complete the *Gifting to Children & Descendants* eLearning Lesson
- Logon and Complete **Gifting to Children and Descendants Mastery Exam**

### Wealth Management: Charitable Gifting

#### Wealth Management Issues - Items #66-68

- Listen to Audio CD: The 13 Wealth Management Issues - Disc 7, Charitable Gifting During Life and Charitable Inclinations section
- Read the *Charitable Gifting* Study Guide
- Review the Concepts for Professionals and Critical Concerns of Estate Planners References in the Study Guide
- Complete the Case Studies in the Study Guide
- Complete the Self-Assessment in the Study Guide
- Logon and Complete the *Charitable Gifting* eLearning Lesson
- Logon and Complete **Charitable Gifting Mastery Exam**

### Wealth Management: Distribution Plans of Wealth at Death

#### Wealth Management Issues - Items #69-71

- Listen to Audio CD: The 13 Wealth Management Issues - Disc 8
- Read the *Distribution Plans at Death* Study Guide
- Review the Concepts for Professionals and Critical Concerns of Estate Planners References in the Study Guide
- Complete the Case Studies in the Study Guide
- Complete the Self-Assessment in the Study Guide
- Logon and Complete the *Distribution of Wealth at Death* eLearning Lesson
- Logon and Complete **Distribution of Wealth at Death Mastery Exam**

## Instructor-Led Classroom Session II

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End Date:	<input type="text"/>

### Client Interaction Skills and Introduction of Capstone Project

#### Tactic 10-12, Readiness Self Assessment

- Client Interaction Skills for the Certified Wealth Strategist® -- Interviewing, Gap Analysis, Presentation Skills, Action Planning
- Discuss Capstone Project



## Capstone Project

Start Date:

End Date:

**Complete all components and priority action items by:  
Recommended 30 days after Client Interaction Skills Class**

- Submitted
- Evaluated and Approved within 4 weeks

### **Certified Wealth Strategist® Designation**

- Awarded- upon receiving the Award Packet via email, a plaque will be shipped. Shipment takes 6-8 weeks.

## Completion Requirements

- eLearning must be completed within 12 months of activation

