



ACCELERATOR #1

ALWAYS BE LEARNING



GUS MUND
REGIONAL SALES REPRESENTATIVE - AGF INVESTMENTS

“The main focus if you’re in this industry should be about learning. I think you have to be a student of the business, you have to work on your craft whatever it is. Whether it’s compliance, whether it’s investment management, whether it’s client facing relationship with management, you have to focus on your craft.”



SIMON PARTINGTON
INVESTMENT ADVISOR - RICHARDSON GMP

“If you’re constantly working, putting yourself in an environment where you are always learning, then there is going to be times where you become more efficient, you get things done faster, and people then start to rely on you for more and more and more.”



DANIEL KRATOCHVIL
SENIOR COMPLIANCE OFFICER - KNOWLEDGE FIRST FINANCIAL INC.

“The courses are the key that unlock the next step. Especially, initially that is what happened for me. So absolutely you want to be in taking courses, you know as many as you can, general courses, securities course, PH, to get that initial registration licensing out of the way. And from there you can certainly tailor your experience based on the career path that you are choosing.”



SUSAN O'BRIEN
VICE-PRESIDENT AND SENIOR WEALTH ADVISOR - BMO
NESBITT BURNS

“And also making sure that I was always one step ahead of my clients. So lots of learning, continuous learning, credentials to make sure I had the knowledge to be my clients’ trusted advisor.”



GRANT ACKERMAN
PORTFOLIO MANAGER & INVESTMENT ADVISOR - TD WEALTH
PRIVATE INVESTMENT ADVICE

“This business is very much like a slingshot, the more you can invest in it and invest in yourself in the early years, the further you’re going to go. So I think that, if you’re going to spend money and there isn’t necessarily a lot of money available in the early years, you know, spend it on yourself. Put it into earning those gold standard credentials and I think that will be money well spent.”

