



FP TRANSITIONS®



Net Positive Consortium  
In Wealth Management

# WINNING THE TALENT RACE

What the Next  
Generation Really  
Wants—and How to  
Deliver It



**Net Positive Consortium**  
In Wealth Management

# THE FIVE PILLARS OF NET POSITIVE IMPACT



## COMMUNITY

Support local causes through charitable giving, volunteering, and nonprofit partnerships.



## CLIENTS

Enhance client education on financial literacy, impact investing, and philanthropy.



## TEAM MEMBERS

Foster a workplace culture that promotes holistic well-being, diversity, and professional growth.



## OUR INDUSTRY

Contribute to the profession by mentoring, offering internships, and sharing knowledge.



## THE PLANET

Commit to environmental stewardship through sustainable practices and initiatives.



FP TRANSITIONS®

# CHAMPIONING THE NEXT GENERATION OF TALENT

FP Transitions is deeply committed to investing in the future of the financial services profession. Succession planning and long-term sustainability depend on the next generation of advisors.

As part of this commitment, we partnered with the FinServ Foundation, where we proudly serve as a sponsor, to better understand the perspectives of emerging professionals.

Together, we conducted a survey to explore what future advisors are looking for in an Employer of Choice.

From a distribution of 350 outreach emails, we received 91 thoughtful responses that are helping shape our perspective on the future of the industry.

# PRESENTED BY



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Discussion Moderator



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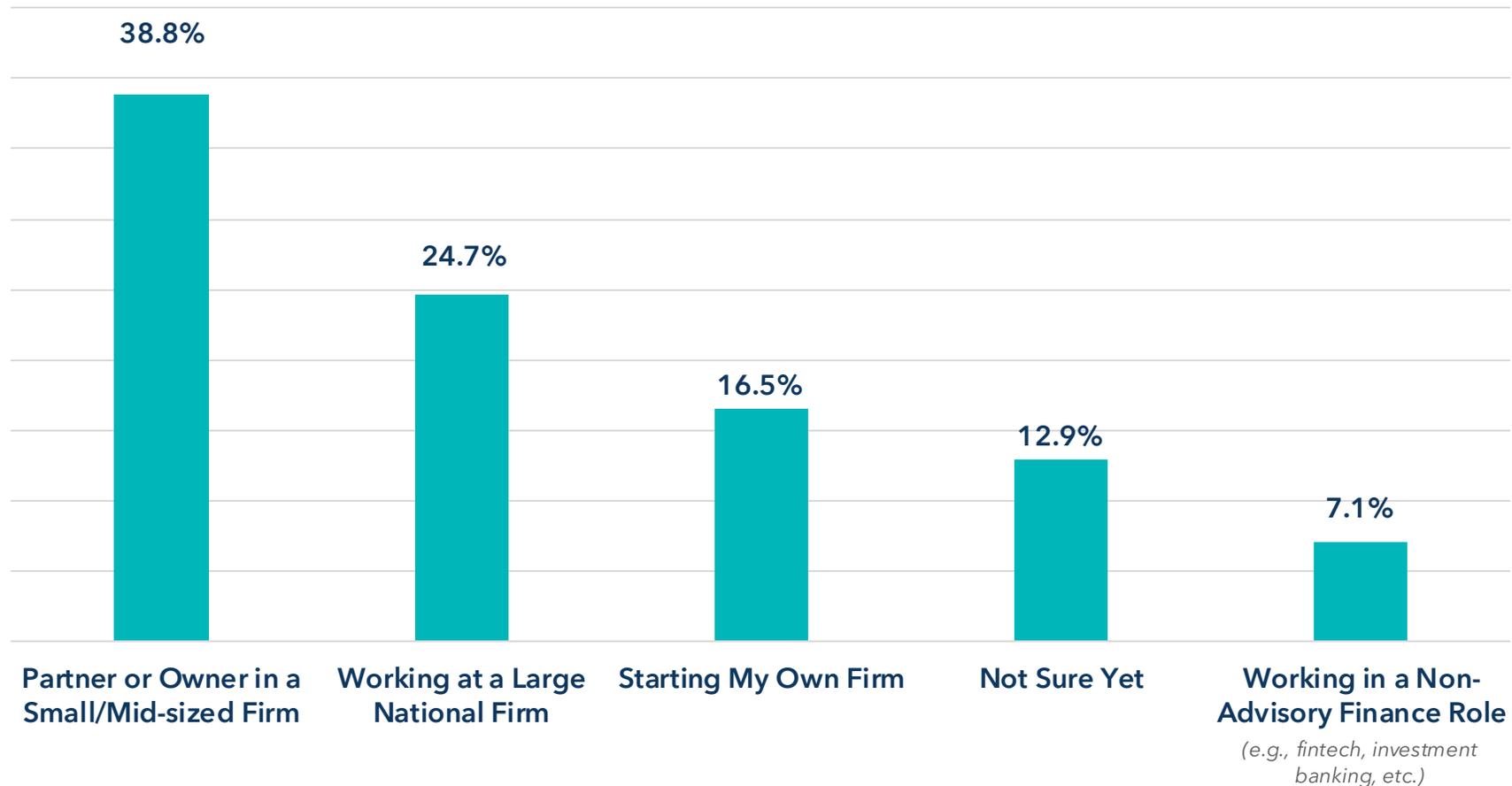


**HOLLY ROSS**

Financial Advisor  
First Pacific Financial

# CAREER GOALS OF ASPIRING FINANCIAL PROFESSIONALS

*"Where do you see yourself in 5-10 years?"*



# KEY FACTORS THAT DEFINE THE RIGHT ROLE

*“What are you looking for in a career?”*

	NOT IMPORTANT	SOMEWHAT IMPORTANT	VERY IMPORTANT	ESSENTIAL
MISSION & PURPOSE DRIVEN CULTURE	0%	10.6%	37.6%	51.8%
MENTORSHIP & PROFESSIONAL GROWTH	0%	10.6%	38.8%	50.6%
COMPETITIVE COMPENSATION & BENEFITS	0%	16.5%	43.5%	40%
LEADERSHIP TEAM THAT REPRESENTS PEOPLE LIKE YOU	1.2%	24.7%	30.6%	43.5%
TRANSPARENT CAREER PATH	0%	15.3%	48.2%	36.5%
A FIRM THAT DEMONSTRATES INCLUSIVITY	7.6%	26.6%	35.4%	30.4%
FLEXIBILITY & REMOTE WORK OPTIONS	8.2%	31.8%	38.8%	21.2%



# STUDENTS' ADVICE TO FIRMS REGARDING QUALITY OF MENTOR

## TOP LEVEL THEMES FOR MENTORS

### SUPPORTIVE AND OPEN-MINDED LEADERSHIP

- Respondents value mentors who are approachable, empathetic, and open to new ideas.
- A willingness to work side-by-side with new planners is highly appreciated.

### EXPERIENCED AND PATIENT TEACHERS

- The ability to teach with patience and compassion is core to effective mentorship.
- Emotional intelligence and experience are seen as essential traits.

### HONEST, TRANSPARENT COMMUNICATORS

- Direct, honest feedback delivered constructively is key.
- Transparency builds trust and drives professional growth.

### STRONG ROLE MODELS WITH INTEGRITY

- Trust, consistency, and ethical leadership are deeply respected.
- Respondents look up to leaders who “walk the talk.”

### TEAM-FOCUSED GUIDES

- Great mentors support the whole team, not just individuals.
- Collaborative decision-making and shared success matter.