

Ep #148: How to Pass the Series 7 Exam
with Kyle Jahnke

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Welcome to the *New Planner Podcast*, where it's all about helping you successfully enter the financial planning profession and accelerate your financial planning career.

This podcast will help you understand the profession, become familiar with the various career paths available to you, and avoid the mistakes that limit your success.

Join your host, Caleb Brown, to explore the human side of creating a successful planning career through interviews, personal experience, and insights from the trenches.

Let's get started.

Caleb Brown: Welcome to 148th episode of the New Planner Podcast, this is Caleb Brown, your host.

My guest today is Kyle Jahnke, financial advisor at the RWS Group in Saginaw, Michigan.

Kyle joins the show today to discuss his transition into the financial planning profession after four years in a corporate financial at a large fortune 500 company. Starting with how he was able to gain the confidence to make the switch and how a family member in the profession helped guide him along the journey and ultimately secure an advisor role.

He goes on to share what licenses he was required to secure to become an advisor, and why those licenses are necessary. Plus, what he did to pass the Series 7 exam, including the

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review materials he purchased, how much he spent on review materials, what his study plan was, how much total time he spent studying, what he did days leading up to the exam, and what he did on an exam day.

Stay tuned to the end too, where he talks about what he would've changed in his study routine, what types of questions he saw most on the exam, and what the toughest part of the passing the Series 7 was for him, plus some other tips for test takers.

If you're preparing for the Series 7 exam, then this episode is for you.

Hey, Kyle, welcome to the New Planner Podcast.

Kyle Jahnke: Caleb, it's pleasure, thanks so much for having me.

Caleb Brown: Hey, thank you for coming on. I rarely do this, but I just want to mention this. I mean, you had to reschedule. It was tough getting this scheduled, but you reached out to me in just a very professional, humble, and gracious way and basically said, "Hey, can we reschedule this? My newborn is in the NICU. I really want to do this podcast." I'm like, "Oh my gosh, yes, absolutely." So the little guy's doing well now?

Kyle Jahnke: Little guy's doing well. Thanks so much, Caleb, for you being so gracious, adjusting the schedule. A lot of new things going on for me and this just takes the cake kind of.

Caleb Brown: I think for the people that have listened to me long enough, family's first and you've got a lot of good information to share, but you need to be there. So, again, I appreciate you the way you reached out and just it was awesome and we're rescheduled and we're ready to rock.

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So, to set the framework, you're a career changer. I mean, it's awesome. I mean, this is one of the reasons why we set the podcast up. So, talk to us about maybe what you were doing before you transitioned into financial planning, and then how you transitioned.

Kyle Jahnke: Absolutely. Timely topic too. Just before we start, part of the reason I'm even in this profession is because of this podcast, and so comes full circle for me.

Just to explain a little bit, I come from a career in corporate accounting and corporate finance.

I worked for Dow Chemical, one of the larger, obviously, Fortune 50 company in the U.S., but around here in Central Michigan, it's about as big as it gets as far as corporations go, small town around where I'm from.

So, working for Dow was a thrill right out of college. I was just a straight corporate finance kind of degree student from a local business school here in Midland, Michigan.

Had the opportunity to co-op at Dow during my time in school, which was great, great experience getting into the field and getting kind of my feet wet, and then eventually was able to be offered a full-time position in their finance rotational program.

So, did a few rotations in corporate finance, and in corporate accounting in Dow, totaling about four years. Made some great friends, had some great experiences, really enjoyed working for the company. It just came down to the fact that I always had a tug to come into personal finance and help real people sitting right across the desk from me.

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And so, that is how I made the switch. And I would be remiss, like I said, to not mention, I spent many a day, was luckily able to listen to some podcasts during my working time, a lot during COVID working from home, and then even at my desk when I was knocking out spreadsheets for work.

Was able to listen to the New Planner Podcast, that actually kind of set the groundwork for me, having the confidence and at least in my brain, enough knowledge to know what I was getting myself into, to ultimately, make the switch which has been just such a huge blessing in my life and I feel like I'm exactly where I'm supposed to be.

I don't know really where I'd be without all of the advice that I've gotten from you, Caleb, and many others who have been on the podcast.

Caleb Brown: I appreciate you sharing that. You mentioned a tug about personal ... I mean, where did that come from? I mean, here you are corporate finance, but where did the personal finance come into play?

Kyle Jahnke: Good question. This is such a common thing I think for a lot of people. We all have the urge when we're trying to figure out what we're going to study, what we're going to go to school for, to do something that makes it different, to help somebody, to set something further ahead than where we found it.

Coming out of high school, I kind of thought maybe I was going to go into medicine of some kind. It's just a very obvious, easy fit for helping people. I mean, there's not much more important things that you can do than medicine, as far as helping people, literally heal people and help people along their health journey.

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I quickly found out though that I would get so bogged down in all of the minutiae in that first semester of even just studying the baseline for what would I need to do to go to medical school that it occurred to me maybe instead of thinking about what I think I should do, maybe I should actually gravitate towards something that I naturally enjoy.

And I've always been someone who has loved saving, always kind of had an interest in investing. My dad always had podcasts and radio shows on in the car. You can imagine, the Dave Ramseys of the world, the other kind of prognosticators that are out there.

And so, I just kind of grew up with a knack towards saving, budgeting. I was interested in how powerful investing could be and setting a plan could be, and where it could lead you and how it could change people's lives.

And so, kind of once I realized that — as far as going to school, wasn't about what I think I should do, it's what I'm naturally good at, I think that's what kind of set me up on the path to realize, “Hey, this is something that I can naturally really be good at and be great at hopefully if I take the time to dedicate to the skills that I need to do it.”

Caleb Brown: So, you're in corporate America for about four years, and then you got someone to take a chance on you, and you've been in the profession for about a year now, I think. Is that right? About a year?

Kyle Jahnke: Yep. Coming up on a year.

Caleb Brown: Just walk us through that. So, is it a local firm or how did you find these people and then just talk to us about the role that you're in now.

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Kyle Jahnke: Sure. Another interesting layer of my story. So, the firm and more specifically, the man who decided to take a chance on me also happened to be my father-in-law.

So, my wife, Lauren's father, Todd has worked in this industry for about I think 23 years, he's coming up on this year. Started off bank wire house side of things, and then actually after the financial crisis did some bank consolidations, he just decided, "Hey, I think going independent would be a lot more beneficial to me and my clients."

And so, that's what he did, started off on his own, and has been doing it since right after the financial crisis. His firm, he partnered up in the last couple years with another local firm out of metro Detroit area which is our namesake now, RWS Financial, which has got a good team of advisors and support staff, about 50 advisors total and a great support staff behind us as well too.

So, that's kind of the natural progression of where Todd came. But of course, him being my father-in-law, there's always been a fun relationship there where he knew I was interested in personal finance, but he also never wanted to push me as far as, "Hey, is this something you want to do?"

I always just consider it really lucky that I've got a father-in-law who would want me to work with him, and I would in turn want to work with him too. I know it's not always the case with in-law relationships, and so I'm super fortunate for that.

But Todd just knew ... me and him had had many conversations as I tried to delve into corporate finance and figure out maybe if I had a plate there. He's always been a great sounding board for me, and was always very frank with

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me about the pros and the cons about making a shift if I ever felt like it, and it was always something that it would have to be on both of our time.

So, as it turns out, just end of the summer of last year just so happened to be the right time. And so, that's when we made the jump.

Caleb Brown: And then part of that was you needed to get some licensing to join the firm? So, what licensure did you have to get?

Kyle Jahnke: So, started off, of course SIE was prereq for Series 7 or co-requisites, I should say. Series 7 as well, we are associated with Abridge Investment Research as a broker dealer. And so, I'm Series 7 licensed also, then went and got my Series 66 licenses. And then I do have some state insurance licensing for life and annuities here in the state of Michigan.

Caleb Brown: Let's focus on the Series 7, if you would. I mean, for the people that don't know, just give them an overview. I mean, like what is it, why do you have to take it and what does it get you?

Kyle Jahnke: In order to be a registered representative with FINRA, you actually have to take the Series 7. So, to be able to buy and sell investments on behalf of clients and be a registered representative, it's part of the co-req. So, being associated with a broker dealer, that is something that was needed on my end.

Obviously, if you're solely RIA, that's a little bit different, but obviously my affiliation with Cambridge and how we run the practice, it was needed for me to just be a licensed financial advisor affiliated with Cambridge and RWS.

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So, that's why I took it, and then of course we can get into as far as the test, what it looks like, the content, things like that, and kind of how I prepared for it.

Caleb Brown: Yeah. And so, it sounded like you did the SIE first, and then you did the seven, it's the top off. Is that what they call it, the top off on the broker check the TO, seven TO?

Kyle Jahnke: I believe so, because at least my understanding is before I got into the industry, there was obviously no SIE, it was all clumped into ... the strategy was one gigantic test, and then, I guess had grace on all of us and decided to split it up a little bit into two separate ones with the SIE being ... I think it's technically a co-requisite where you have to take it with the 7, but you can't do it backwards.

Caleb Brown: It's SIE first and then that gets you qualified for the 7, which like you just said was not the case.

Our listeners want to know, especially the ones that are going to the broker dealer, the FINRA registered firms, what did you do to pass, how did you get through this? It can be pretty daunting.

Kyle Jahnke: Absolutely. I, especially felt that way my whole career prior was corporate finance, which really has nothing to do. I mean, there was maybe a bit of overlap if I'm talking about maybe treasury things in my time at Dow, but there was really no overlap, and really not a whole lot of overlap between what I learned in school and what was on the Series 7.

So, as far as what I did to study, I mean first things first, you've got to pick your exam prep software. I know a lot of people go about things in different ways. I just really enjoyed Kaplan. I

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kind of tested out a couple as far as they let you kind of delve in and see which experiences you like.

For the Series 7, I decided to go with, I think it's the second package, I don't remember what they call it now. They've got all these names for the packages, but kind of a mid-grade online test prep package, which is the full access to the textbook. And then of course the whole-length and all of the simulated full length exams that are included in that package with Kaplan.

So, went through that and set a study calendar and follow it, and trust that Kaplan, if I followed the plan that they set out and they said works, trusted that that was going to get me to a pass when it came to testing.

Caleb Brown: And do you recall approximately cost-wise, what it cost you?

Kyle Jahnke: I actually got a bundled package for the 7 and the 66, and so I think all in the total cost was maybe \$500, maybe a little bit less, if I'm remembering correctly, for the two. There might have been some kind of incentive as well too, some kind of special deal. But I think that was maybe the ballpark of what we were looking at. I think it gets you like 90 days of that.

Caleb Brown: So, this is all online learning. And maybe just walk us through, is it just material and you kind of absorb that and do some practice questions?

Kyle Jahnke: Yeah, a little bit. I actually listen to some podcasts about different folks who are test prepping as well. I know people have a lot of different ways to go about it. My thought going in was, "If there's a textbook, I want it." And that's just because this is stuff obviously, in school, you've got tests and you think, "Oh, I'm never going to use this."

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There's always that to some extent when you do take an exam like this. But my thinking was, "I need to know this. I'm coming in really green and not being in the industry, I need to know this stuff."

And so, I tried to approach it, not just, "Hey, let's pass this exam." Which of course, you have to attack it with that mindset, but also let's learn the content.

There's like content from the textbook, A, it's going to help set me up for my career and what I want to do as a registered rep. And B, it's going to give me better context when it comes to the question, and just figuring out what I can get rid of, which ones I can hone in on. It just gave a lot more clarity.

So, just to clarify that, Caleb, I actually went through, it was a physical textbook. There was also an online option of the textbook, and then there was like chapter review, quizzes and tests like that after each chapter that I went through.

So, I actually started off and I read through the entire book and took the quizzes online, did the corresponding things, and then after that of course, then just honed it on the QBank and really buckling down.

Caleb Brown: How long did it take you to study for all this?

Kyle Jahnke: For the seven, I'd say a month and a half of really dedicated studying as far as multiple hours almost every day. Maybe one day in a weekend, you're busy and you don't, but you make up for it.

That was kind of my cadence. I'd study mostly after work. My team here was always great about giving me free time as far as to do some studying while I was here. At the same time, when

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you're brand new at a job, there's a million things to learn, there's a million things to do.

So, most of it was on my own time after work, and then weekend morning, I tried to knock things out too, before the hustle and bustle of the weekend came around.

And so, I'd say about 45 days with the first 30 being really dedicated to getting through the chapters, trying to learn the content, figuring out how it all fit together, taking the quizzes, and then the last two weeks, really to just buckling down on the QBank and taking all the simulated exam that I could possibly take.

Caleb Brown: That's helpful, thanks for sharing that. And to your earlier point, the corporate finance background, at least what I heard was that didn't help you much on this. So, maybe just talk for me ... I mean, what are the majority of the questions? Is it investment concepts? Talk to us about that.

Kyle Jahnke: I'd say it's a pretty interesting distribution of maybe not as much application as you see on some exams.

I've heard a lot about the CFP, thinking about starting that journey, it's all application basically. I know the 66, there's kind of a lot of application, putting yourself in situations. There's of course some of that, but there's also a lot of almost general vocab. I hate to say vocab because that sounds too simple, I guess.

Caleb Brown: The lingo, and knowing the acronyms, all that stuff.

Kyle Jahnke: Exactly. There's a good portion of that as well too. And then of course, there's also some applied concepts, I mean,

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simple math when it comes to options and margins, things like that that's just a chunk of it too.

Caleb Brown: Okay, I'm with you. And then, so we talked on for how long it took cost-wise, the review course. So, it was a self-study review course, you didn't do anything in live or any cram courses or anything like that?

Kyle Jahnke: I actually didn't, and maybe that was just me being naive. I just bought the package and I guess I was stressed out enough taking this as everybody listening to this can imagine, that I just tried to simplify everything else that I could.

I just tried to say, "Hey, they've got a study calendar" which I can kind of talk about a little bit more later at the tips section maybe. But there's a study calendar that they provided me in that package as far as you could customize it to when you were taking the test. They would say what you need to do each day to get ready for that.

And so, I just leaned on it. I just said, "Hey, if I follow this study calendar, I read the book, I digest the concepts, and I just hammer the QBank that I'm going to be okay." And at the end of the day, there were also a lot of, as I mentioned, comprehensive exams at the end that kind of simulate the final. And I took as many of those also as I could just trying to put myself at much as ease as I possibly could before taking it.

But I've heard a lot of people take like some of the cram things, last minute, last week course and I ended up not doing that. I could see where it would be helpful.

Caleb Brown: How many practice questions do you think you completed in that 45-day period?

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Kyle Jahnke: It was definitely thousands. This won't come as a shock to anybody who's used Kaplan. I know Kaplan's QBank is just gigantic. I guess that's one thing I would say to folks is, if you're studying and I just remember looking at ... there's a certain analytic section which I used a lot as well as seeing what areas I was succeeding on, what areas I needed to work on.

There was also just a general gigantic, almost like a pie chart that said how many questions I had answered out of the available Kaplan QBank. And I remember being so discouraged because there's like tens of thousands of questions in the QBank.

And I remember, I think by the very end, I got to maybe half of answering all of the total questions that Kaplan had available, which again, was still in the thousands. But I just remember being like, "Wow, there's a lot of questions here for me to answer." But I felt like I answered as many as I possibly could cram into those 45 days at least.

Caleb Brown: And then being nervous, I get that, the stakes are high, this is new content for you and you're also learning a job and you also had a pregnant wife at the same time. So, a lot going on there. What did you do maybe leading up to the exam day and then the exam?

Kyle Jahnke: The last week, leading up, like I said, I tried to just really focus hard on getting those simulated exams to at least one or two a day in an environment that simulated the exam, as in not having my cell phone with me, kind of locking myself in a room, honestly, not getting up for water or bathroom breaks.

Not that you can't at the testing centers, I know you can, but I just really tried to limit distractions that last week. It just put my

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mind in a spot where I was, I don't know, I guess I don't know about you Caleb, and I don't know about people listening, but I know it's hard for me these days to sit for three hours straight and do anything, let alone take a test.

Caleb Brown: Major league baseball is having a lot of trouble, that's based on what you just said right there.

Kyle Jahnke: I need a pitch clock myself. No, but in all seriousness, I mean, in today's world of instant notifications and client calls, I mean, it's hard.

I didn't realize how much of a challenge just that would be, just dedicating three hours, even six hours a day towards the end there. Morning before work and then night after work doing a couple exams, and just blocking everything out, that was difficult.

But I think that really did help me. That was a suggestion from a friend of mine actually, which was a huge help. And then I know they say the day before, don't overdo it.

And so, I really tried not to overdo it the day before. I took one final exam, felt good and got a good score on it that I was happy with, and I just left it at that. I said, "Hey, I'm done, it's noon the day before, I've got the test tomorrow at 10:00 AM, I've done what I can do."

I think at that point, it's more about being confident than anything else. I think that's probably the biggest factor, is if you've prepared by that point, it's going to show on test day, and so just be confident in it, try to do things to kind of relax maybe.

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I know me and my wife Lauren kind of did. I think we went out to dinner that night before just to kind of get my mind off of it a little bit. And then test day, I actually took the test at our testing center. The closest one to me was about an hour and 15 away. I opted to take the test in the morning just so that I could get it over with, so I wasn't waiting all day.

And I just popped the podcast on that I wanted to listen to that morning for the car ride. I tried not to really go through margin scenarios in my head and option scenarios. I just listened to a story on a podcast, got my mind off of it, and tried to just be as calm and as confident walking into that testing center as possible.

Caleb Brown: And you got the outcome, you took it once. You passed it on the first time, which a lot of people can't do. I know like some of the bigger companies like Vanguard and some of the other ones, if you can't pass it the first or second time, you're gone. Some company will just give you one shot.

So, anything you would've done differently? I mean, would you have changed anything?

Kyle Jahnke: It's hard to say when it went well. I mean, the outcome was good. I didn't feel overly stressed, but I think one thing that I would've done in my preparation is I think I should have spent more time on the few areas that were giving me maybe more trouble than others.

And that can be counterproductive because you kind of harp on something, and then sometimes you're going to lower your score in other sections that you would be getting if you were continuing to keep practicing those sections too.

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So, knowing all that, I really buckled down at the end and earned my weakest points, points that I was really unfamiliar with. I just tried to make those strengths and at least that gave me confidence knowing that, “Hey, these were terrible. I know I can now get these questions because I just hammered the concepts and did a lot of practice on them, the rest kind of is going to come easier.”

That worked out for me in the end but, it's one of those things I wish I would've thought of sooner. I mean, not spending too much time on areas that are difficult, but at the same time, I'd say buckling down, doubling down on those sections. Not wasting time, but just putting your extra time there. I would've done that earlier, if that makes sense.

Caleb Brown: Yeah, I'm with you. I mean, there's like a mental and a physical component. It's almost like, look, if you've put in the time and you've gone through thousands of questions like you have, and you have done fairly well on the practice exams, I mean really, it's the mindset shift of, “Okay, I've just got to stay alert, sharp, got to keep my energy level up for 3 hours and 45 minutes.” That's hard to do.

I mean, that's very hard to do because these things are long, they're draining, they suck the life out of you, and I feel like the people that I talk to that they can just somehow keep the energy up, and just keep the confidence even when they come across stuff like, “Oops, I don't know that.” And it doesn't rattle them.

Kyle Jahnke: Absolutely. I couldn't agree more. There's something about the peace of mind, you never know what the outcome of the test is going to be. I mean, until you click that button and it

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pops up on your screen, which is the stressful part of the whole thing, I think.

Until you do that, you're never going to know, but at least you could have some confidence knowing, "Hey, I did the stuff that was set before we to prepare." And if it comes down to me just stressing out, okay, but at the same time, take control of what you can control, keep those nerves in check.

If you see a question that you're not familiar with, don't spend too much time on it. You can always come back to it. That was a huge help me.

Caleb Brown: You mentioned a study calendar and as we're kind of wrapping up here, I mean a lot of good tidbits on how to help people. I mean, I've always been on the fee-only RIA side, so I only had to take the Series 65 a long time ago.

So, never had much experience with the seven other than the candidates that we talked to. So, what are some tips that you have for these people that are going to be facing this?

Kyle Jahnke: Absolutely. I was wracking my brain about this too and trying to think of things that would've been helpful to me.

Like I said, the study calendar, Kaplan did a really good job of, you can make a personalized study calendar where it's got all the concepts, got all the quizzes, all the tests, everything that you need to do to stay on track, and when you get the first testing software, you plug in your date of your test, and it lays out all of your calendar from the test day to current day, and everything that you should be doing each day.

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So, I guess it just worked for me in my mind to just follow it. Sometimes it's nice to have a plan that you know is going to get you there and stick to it.

So, that was one, try not to fall too behind on it, I know a couple weeks a day gets by, and then all of a sudden you have got double the work. Take it one day at a time, allocate things, catch up when you can.

ry not to let it get too out of hand as far as what you need to do. If you miss a couple days, those hard resets are okay. That was really helpful for me too. I had a couple days where things mounted up, caught up on a weekend. There was some mental clarity that came from that, which was nice.

Like I said, just the whole preparing for what you can prepare for, that's huge. Maybe I used some note cards. I'm not a huge note card guy because you've got the QBank, but at the same time, I had like a little cheat sheet card as far as drawing my options table and some notes on just areas that I really wanted to focus on.

And I kept that with me. While I was at work, I kept that with me in my car, I kept that with me ... just having that sink in was big. That's one thing that was nice about that little card is, I had it almost memorized to the point where they give you a little sheet of paper when you sit down in the testing center. And I actually just started ... as soon as I sat down, as soon as they-

Caleb Brown: They got data dump, right?

Kyle Jahnke: I just unleashed the mental archives of what I had on my cheat sheet card and tried to get as much of that down there as possible. And whether that was super helpful or not, I don't know, but there was something cathartic about it too, of just

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getting that down, setting the table, and then going on and taking the test.

So, I think those were two things that were big for me.

Caleb Brown: And there's a lot to be said. I mean, if you're an old school guy like me, I'm just writing things down. I find that I write them down, I can remember them. It helped me on the CFP and some of the other stuff I've done.

So, awesome stuff, Kyle. I mean again, thanks for squeezing us in on the family stuff. I mean, very impressive, awesome story. Glad you're in the profession. Anything else you want to share with the new planner community before we log off?

Kyle Jahnke: Just a big thank you. Good luck to anybody who's going to be taking the Series 7 coming up. Feel free to reach out to me, I'm on LinkedIn, feel free to reach out, shoot me a message, I'd love to offer any specific advice that I can. I'm not the Series 7 whisperer, I just passed it, but if I can help relieve any stress for you, feel free to reach out.

On that same note, like I said, this podcast has been such a huge resource for me getting into the industry. I was just telling you Caleb, before we jumped on the recording, it's very rare that when you've got a huge decision in your life, there's a whole podcast dedicated to the pros and cons of doing it.

And so, I'm extremely thankful for you and the community, and also, all of my colleagues who have been on before and shared their stories, it's been a huge help to me. I've been able to connect with some on LinkedIn and things like that before and I'm just extremely thankful for this platform and for everybody who plays a part in it, including yourself, Caleb.

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Caleb Brown: Thanks for sharing that. Appreciate it, and thanks for coming on Kyle.

Kyle Jahnke: Absolutely. Thanks, Caleb.

Thanks for joining us for this episode of the New Planner Podcast. If you are ready to discover the top career paths for financial planners and see which track is best for you, we created a free guide to help you.

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There, you'll also find more tools and resources all created to help you build a successful financial planning career.

Tune back in next week for another episode, and until then, we are here to help you succeed.