

**Ep #173: Finding a Part-time Entry Level Opportunity
with Joshua Walker**



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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 the 173rd episode of the new planner podcast. This is Caleb Brown, your host. My guest today is Joshua Walker, a financial advisor with Wright Planning in Fishers, Indiana. Joshua joins the show today to discuss his unconventional path to becoming a financial planner, starting with how he got hired into a family business that served dairy farmers and why what's supposed to be a short stint ended up stretching for about 20 years, what he learned during his time in the two-person company, and how he became interested in a career as a financial planner.

Check out the middle too where he talks about how by approaching one person in his church, the entire world of financial planning opened up to him, which helped him formulate a game plan for entry and getting the necessary credentialing and licensing, how he started to build his network and even though putting a substantial effort into the job search and network, he encountered a lot of difficulties trying to find firms who would hire him, how he overcame these challenges, didn't give up and eventually found a firm where he works part-time doing everything he can to add value and free up the senior planner he works with.

Stay tuned to the end too, where he talks about the mental and emotional highs and lows of all his planning and preparation finally becoming a reality,

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what his goals are for the next three years, and tips for new planners. If you're struggling to get a firm to take the risk in hiring you, then this episode is for you.

Hey, Joshua, welcome to the new planner podcast.

Joshua Walker: Good morning, Caleb. Thank you for having me on. It's a real privilege to be here today with you.

Caleb Brown: Privilege is all mine. Thanks for making a few minutes for us. I want to start with you. I mean, very interesting story, career change. So all the career changers out there, I mean, this is hopefully going to be applicable to you.

Start with what you're doing right now. You're at a financial planning firm. What is your role right now? What are you doing?

Joshua Walker: Sure. Yeah. So right now I am three months into the position this week. The job title is financial planner on the business card, but in a diamond team format, I'm at the bottom of the diamonds and at the corners as well, working with my boss, Brian, who brought me on to learn the trade from scratch.

I had no experience in any formal workplace in the financial planning or any part of the financial profession. And so learning which way is up, learning what you can't do, learning how to operate the software and be his associate planner, pair of planner, all of those ill-defined terms wrapped up into one

Caleb Brown: Jack of all trades there, right? So they hired one guy for like four positions. I like it. So really you described apprenticeship. It's apprenticeship model, right? And that's amazing. We want to explore that further if we have time but I want to take a step back. Like, how did we get here? Because you're not out of a CFP program.

You didn't get your undergrad. So why don't you start with sort of what you were doing in college? And then we'll work up to the role now.

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Joshua Walker: Sure. Yeah. My wife and I met in high school and we went off to Purdue together. And after a year there, got married and she went to work and I was able to finish up my degree early and studied physics and discovered partway through that, that was not going to be a career track and had the privilege to go work with my father. At the time, he was part of a firm that, they have products that, if you can believe it, that dairy farmers use to help get their cows bred on time.

And it was not at all what I studied, but having the chance to work with my dad, well, if you had the chance to work with my dad, you'd do it too. Great guy he is. He continues to be a great guy. And when he brought me in, he said, "We got five to seven years with this primary products that we have." So we know it's not going to be forever. We're going to both be doing something else someday. And that was in 2002. We stretched five to seven into 18 to 20, but right about 2018, 2019, we saw the writing on the wall that he was close enough to the ends to retire, but I was gonna need to do a career transition, and it was time to find something suitable for the family.

"But you gotta go do something else, Joshua. You can't keep working for me." So leave that nest, yeah.

Caleb Brown: Wow. So, okay, so you went to Purdue, you studied physics. That just sounds painful and horrible to me, but I appreciate that, to each their own. Yeah. You come back and work in the family business and not even, I mean, that really wasn't your goal.

It didn't sound like, and then you helped your dad. Can you just maybe just give us a brief over, you're not going in too much detail like just what the product was.

Joshua Walker: Yeah. Okay. So on a dairy farm, you don't want to have any male house around. Big, and they're ill-tempered. They are genetically inferior, they carry disease, and above all they're dangerous.

So in the 50s, we started breeding the cows artificially using frozen genetic supply, but the trick is when you take the bull out of the equation, you don't know when the right time is to breed that cow. So our product helps the dairy

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operator know, “Hey, in the next 12 hours, she's got a window of fertility, and if you don't hit it, they're going to be out for another three weeks and that's food wasted and no baby cow on the way.” So they got to hit that window and our product helps make that happen.

Caleb Brown: Sounds like the company was already kind of up and going and he just brought you in, or did you help him launch it?

Joshua Walker: The product was developed with the dawn of the industry back in the 50s. He got involved with those folks in the 90s. Brought me in 2002 and through the machinations of how people come, people go, and it's just the two of us now, me and dad.

Caleb Brown: So you sound like you were just doing everything. If it was just you two guys, is that right? Marketing sales, is that what you were doing?

Joshua Walker: Marketing sales, distribution, we've got a warehouse here in town, so it's still, we're winding it down. So we've got a couple more years, but emailing with the folks in Costa Rica and Oman and Denmark and Australia and New Zealand, got to do some traveling to the overseas, trade shows. It's yeah, two of us, so jack of all trades and familiar with wearing that entrepreneurial, everything is down just in two of us.

Caleb Brown: Wow, that's amazing. And then you knew you're going to have to make a pivot because he said, “Look, we're not going to sell this for billions of dollars and you can retire somewhere.” Did you go through a process of looking at other potential career? How did financial planning fit into that?

Joshua Walker: All along, since he told me at the beginning that it was temporary, I've sort of wonder what else might there be? And none of my neighbors, none of the folks at church, none of what they were doing seemed to really resonate. And it came from how we homeschooled our daughter for several years and part of the curriculum that we cooked up for ourselves was I would bring articles from the Wall Street Journal, and my wife would bring articles from the Atlantic, and it was, “Bre, this is what you need to know about the world and the way things work.”

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And we noticed that I kept on bringing up personal finance articles, “And Bre, someday you're gonna do your own taxes, and you gotta know this stuff.” And reading those articles, kept on seeing the reporters quote somebody that was a certified financial planner and so and so is a certified financial planner and it finally clicked that this interest I've had in personal financial planning is a career.

That's a thing that people can go get a certificate and professional recognition and make a real career out of that. Once that light bulb clicked on, it was, “Oh, finally, talking about personal finance isn't just something I can do to bug my friends, but that could be a second act that could work.”

Caleb Brown: And when was that? How many years ago was that?

Joshua Walker: The glimmerings were in 18 and 19, and it was in 2021, I thought, “Yeah, this is gonna happen,” but it took until 2022 that I finally got the gumption to go up to a CFP at church and say, “Hey, can I take you to breakfast and ask you about this whole thing?” And at that breakfast was the pivotal moment where he said the words, “Michael Kitsis,” and a whole world opens, and I discovered, oh wow, there's so much out there. And this is fascinating.

Caleb Brown: Michael Kitsis, who is that guy? No, all kidding aside, I appreciate the transparency. Why do you think you were nervous to approach this CFP that you got, you went to church with?

Joshua Walker: Part of it was just the overall terror of facing a career transition at the age of almost 40 that I have a wife that, she's got a health condition that's managed, but it takes a ton of effort, frankly money, to manage that condition, and so, and she can't work, and she can't drive, so just that whole question of what am I going to do that's allowed me the income and benefits to care for her, but that isn't going to tie me to a desk, eight to five, or a classroom from seven to three so that I can be available for her to get her to the appointments that she needs to go to, and oh man, this is real. This is gonna have to happen. I'm gonna have to walk up to somebody and say, “Hey, can I talk to you about something?”

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Even though it was a friend at church and we knew each other. It was just, I knew it was a big first step. And it was big and he made it easy and it was great. Yeah, but just stepping out of my comfort zone and breaking through the shell and saying, “Hey, Scott, can I talk to you?”

Caleb Brown: It was the cusp of the idea like hey, I thought about this, now it's actually, I'm setting the chain of events in motion, it's action, right? So that is a nervous thought, yeah.

Joshua Walker: And then, in a sense, I had all the possibilities in the world open before me, but to start down one path means I'm not going to go do something in the medical field, I'm not going to become a teacher and teach calculus and physics.

It is closing off every other option. I'm not going to get too many at-bats when it comes to restarting a career. So yeah, terrifying.

Caleb Brown: Okay. So you ran into Kitsis in the end, what did you do? Do you sign up for the CFP or what did you start doing after that?

Joshua Walker: That helped me understand the lay of the lands, the past, the need for education, the tracks through the industry.

And one of the things that he talks about frequently for career changers is networking, talking to all the people. I mean not networking in the classic sense, but just talk to the people that you know that might be useful. And then roll that stone one turn further down the road. So talk to somebody else at church who had a planner that happens to be inside the blue organization.

So I talked to those folks at Blue and they said, “Hey, we've got the Ron Blue Institute, you get your CFP, you get your CKA, it's all bundled into one, you sit for the exam, and then the sky's the limit.” And that ended up being the path that I took. Signed up for a combined CKA CFP education program that started in November of 22.

Caleb Brown: Gotcha. And then you went through the classes. So maybe just talk to us about going through the coursework. I mean, did you feel like

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you knew most of the stuff, or what did you—were you learning a lot or a little bit of both?

Joshua Walker: I've been managing my own finances and doing my own taxes for 20 years. So when the fundamentals book landed with a stud on my doorstep, I opened it. There was a lot of stuff that, yeah, there's some familiarity here enough to confirm that, yeah, this is a good choice. But enough to be a really sobering moment of wow, I knew there was a lot of stuff that I didn't know, but to see it laid out in—this is 700 pages and it's book one out of six was, oh, wow, there's a long way to go on this path. That's why people talk about how hard it is.

Caleb Brown: Well, and it can be intimidating, right? So maybe just like other career changers that are considering this when they get all that, it's like, “Hey, I know all this about physics and I know about calculus. I don't really know anything about personal finance.” You kind of already just said a little bit, but is there something else you can just tell that person like, “Hey, it's worth it. Stick with it.”

Joshua Walker: Well, yes. No, in both ways that if you get that book or get into a course of education and there's a sense to which it's clicking and you're enjoying it, then yeah, it is achievable. One of the professors always said, “This exam is not bigger than you.” And yeah, it is. You can do this, and you follow the schedule and do the work, and this is achievable. But on the other hand, if you get into it and discover this is gobbledygook, and all the hours I'm putting in are not working, I don't know that I can say that it's going to get easier by the time you get into income tax, and qualified plans, and estate planning. That if you see that there is not a light at the end of this tunnel, then say, “Hey, this is for other people. It's not for me. I'm going to find a better fit.” If this isn't the career choice for me, don't force it. Because you don't want to be ongoingly miserable.

Caleb Brown: So then you took the courses and then you passed the CFP exam.

Joshua Walker: I sure did last November the 4th.

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Caleb Brown: November the 4th. That's 2023. So that had to make you feel good. I mean, you're making a big risk doing this, changing careers. So how were you feeling then?

Joshua Walker: Both the immense relief of this is done, it's behind me. And I'd done the 65 about 9 or 10 months earlier, heard a couple of other students on your podcast talk about what a difference maker it was resume-wise to have an entry-level exam, whether it's SIE or 65 on the resume, that's a show of good faith and a level of competency to put on that resume for somebody that it might be leery about taking a chance on a career changer.

So having that confidence and the coursework I did was one of the more rigorous programs. So going into the exam, I had a level of confidence, but still seeing that preliminary pass on the screen was a big relief. That was a happy moment.

Caleb Brown: So here you are, you pass the 65, you got the 65, you pass the CFP. You've done the CFP education. You've got roughly 20 years in a family business, went to Purdue, excelled in a physics degree. So you've got some mental firepower and you went out to the job market after that, and you got flooded with opportunities, right? Is that the way it works? You just have people knocking down your door to hire you.

Joshua Walker: I had to beat them off with a stick, Caleb. Yeah, it was out of control. No, it was going into spring and summer of '23. I was envisioning a possibility where I start with a firm at an apprentice kind of level while continuing the education because that's a real thing that people do. But that was on the heels of 2022 and everybody that was AUM was just sporting a lot of black eyes financially at that time period. And it was sobering just how many people would say, "Oh, wow, Joshua. Yeah. You're going to be great for somebody. Not me, not here, not now. Go find somebody else. Best wishes." And that was more than a little draining. I didn't have the experience of sending out a 8,000 resumes and getting 8,000 rejection because I was fishing in a Northeast Indianapolis. We're not relocating. I know that closed off a lot of options. There's a lot of good options here. The northeast side of Indianapolis has got a lot of good options, but at the time, it was a matter of, okay, well, got to find the right fit. There's somebody out there that's looking

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for somebody like me. I'm sure of it. Everybody says so. I just have to keep chipping away at that and following the leads and see where it takes me.

Caleb Brown: How many people do you think you reached out to and then how did you find these people to reach out to?

Joshua Walker: Well, the way I found them was I signed up for our local FPA chapter, I got student rates and that was an outstanding decision because the FPA chapter of greater Indiana, Central Indiana is outstanding. They've got quarterly meetings that are really good. The next-gen program is rock solid, third Friday of every month we get together at one of the local firms and there's a dozen of us that work through case studies and those people in that group work immensely helpful not just from a social aspect of making friends and getting to know faces in the business, but also, "Hey, Joshua, you seem like an interesting fellow, talk to so and so, talk to the other person," and just the encouragement of keep on, keep on, and one of these connections is gonna lead to somebody, but, oh my gosh, the FPA group, if you're not in a region that's got a good FPA group or a NAFTA chapter, that's unfortunate, and that's gonna be tricky because that's made all the difference in their career change past that I've been on.

Caleb Brown: Can you just give us a sense on if you remember how many firms you talked to and you got rejected by?

Joshua Walker: I'd say I took 20 people out to coffee for informative stuff and a dozen of them were in decision-making hiring capacities at the firms that they were at. On top of that, there's probably another 10 or 12 resumes that were sent out into the, you know, hiring at abcfirm.com. That didn't go anywhere. Not that I really expected it to. That would have been absolute serendipity, but yeah, 20, 20, I think would be not overshooting it or underselling.

Caleb Brown: And why didn't you give up after that? I mean, let's just call it 30. You got 20 coffees, you sent out 10 resumes, you got 30 rejections. Why did you just not say, "Look, maybe this just, I don't know. I'm going to do something else."

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Joshua Walker: I think there was two things that kept me at it. One was that I was still doing the education and that there was a line in the sand that I could tell people, Hey, first week of November, I'm going to pass this exam. And that if people were saying no, I still had that opportunity to tell myself, "Well, things will change once I've got that." I still might have zero experience hours, but at least I'll have a candidate for CFD certification that I can write down and then have that exam passed.

So that was going to help keep me going. The other thing was knowing that while it was absolutely the second most horrible option, the existence of outlets like X, Y, and PN. I at least add in the back of my mind, "Well, we're winding down the cow business with dad. I've got a bit of a runway. I suppose I would if I had to, in desperation, hang out a shingle." So I don't really need somebody to hire me, but golly, it will be so much better to learn from—

Caleb Brown: Yeah. You didn't want that, right? That was not your first choice.

Joshua Walker: I don't want to be making mistakes with other people's money as a foundation for a career. I need to have somebody like Ryan looking over my shoulder saying, "No, no, no, Joshua. That's not how we do things around here. That's not good. Don't do that." That's what kept me going just because the other options were just over there around the corner, I could start my own thing or pass the exam and things will be different then and they work.

Caleb Brown: I've got to share. I mean, you reached out to me and you sent me a resume and I'm like this is a bizarre story. And then I'm like, what? I had all these questions and then I kept scrolling down. I was like, "Well, here's a video while I have this on my resume. Here's a video while I have this, here's a video about me." I'm like, I thought it was really, I mean, it was memorable. And that's why we had a phone call, right?

I think you were, if I'm recalling, I like, "Yeah, I have some clients that would love to hire you, but you got to move." That was an option. I just didn't have anything in Fisher. So do I have your permission? I mean, or would you be okay if we put—I'm using your resume and your cover letter in my class at UGA.

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Joshua Walker: Oh, really?

Caleb Brown: Are you okay for us to put that on the show notes?

Joshua Walker: Yeah, go for it. And I did try to be relatively transparent on the resume, especially with stuff that wouldn't really belong on the classic resume that, you know, I've run the neighborhood HOA for 10 years. That's not really planning adjacent, but it shows responsibility and being able to work with people and being an elder in church for 15 years. I'm able to have hard, challenging, awkward conversations. I've not just been working in a cube or hanging out with cows the last 20 years that, yeah, so yeah, by all means, if my story can be helpful, whether it's by podcast or by the resume and videos, by all means, go for it.

Caleb Brown: And that's one of the things I love about it because you have like a little summary, then like a couple of bullet points on transferable skills.

I mean, you lay it out. It was beautiful. So all right, so we'll post that bring us back full circle here. So you sort of canvas the area sort of where you live. You kind of had, I think, some pretty specific things that you were looking for, and then you finally got someone to take a chance. So what happened? How did you get with the current firm?

Joshua Walker: Sure. Yeah, it was FPA. Had a professional development continuing education meeting in August, and I knew that one of the guys that was going to be presenting was on my target list, that he was going to be speaking, so I didn't send him a cold resume because I knew I'd be able to shake his hands at this meeting. And that's when I first met Brian in August of last year, August 23. He's on the board here of FPA and he's keen to see the industry grow in general, not just for his own sake. So he accepted my breakfast invitation and that turned into like a three-hour breakfast where we talked about our lives, our careers, and clicked on a personal level.

And the interesting thing about Brian is that he's a financial planner, he's been doing that 16, 18, 20 years, went out on his own about 24 months ago now, but he's married to a CPA that's running her own tax firm. And for years,

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when he was working at a larger RIA as an advisor, there was a whole lot of back-and-forth synergy.

She would be able to talk to her tax planning folks about financial planning and the benefits of that. And he had financial planning clients and said, “Hey, obviously no obligation, but I happen to be married to an outstanding tax preparer.” And the two of them have their own separate businesses. He's the CFP running his own RIA.

She's the tax accountant, tax planning, running her own shop. And then together, they've got a third enterprise where he discovered he was working with a lot of business owners as financial planning clients and that a lot of the same things we do in financial planning were extremely transferable to small business that if you start with, “Where are we and where do we want to go and how do we get there?”

And those same steps are, well, you understand the situation and you identify and prioritize goals and then you analyze the paths and the alternatives and you develop a plan and you present the plan and you implement, all that same stuff. That works for business owners, and if they can do what they call a fractional CFO, he says fractional CFO on steroids because they do all the forecasting and the cash planning, but we also get to do, and I'm part of the picture, we get to do taxes, and we have financial planning for the owners, and making sure their books and financial statements are sparkling, and they were looking for somebody like me because tax season is grueling, and they got planning clients.

And they got these business owners and they're hoping to grow and they discovered that, “Hey, maybe this goofball Joshua is the answer to our what's next because he's somebody that wants to do financial planning and taxes and has experience being a small business owner. This could work.” And I think three months in, so far so good, but tax season is right around the corner so.

Caleb Brown: The rubber will hit the road here shortly. And I know you've only been there three months and kudos for sticking with it. And finding a good, sounds like a really good fit. What have you enjoyed most about the last three months?

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Joshua Walker: What I've enjoyed most is making this transition a reality that for five years it's been something's got to happen. And then for 18 months, it was okay, I'm studying, and I'm staying up late, and I'm putting in hours to learning all this stuff, and I'm going through that horrible quiz bank, but then actually putting on a shirt, and going to an office, and carrying my cute little computer bag, and sitting down, and learning actual financial planning with an actual CFP and actual clients and being able to sit in on client meetings and talk yesterday with the folks about, "Do we buy the vacation home in Michigan, is it too soon, is it the right time, is the cash flow..." Real life, real financial planning that's not goofball case studies in the books, but actual kids and dreams and we can make a positive impact in their lives and give them the confidence to say, "No, that's a terrible idea." "Yeah, the time is right. Let's jump. Let's do this."

Caleb Brown: And I just want to reiterate, I mean, you're an apprenticeship model. They're paying you some sort of base salary or whatever it is. You're not having to bring on clients, generate revenue, and do anything like that. Is that correct?

Joshua Walker: That is correct. They knew what they were getting in terms of I'm not bringing in a book of business from any previous place and yeah, it's straight salary and it's part-time and it's flexible because we are still winding down the cow business for another couple of years. And one of the reasons that this fit is that it works for them as well. Some weeks I do 20 hours, some weeks it's more and they're flexible with my wife's appointments and our snowboarding. That worked out okay.

And we go to Florida each January so my wife can get out of the Central Indiana cold and with Zoom and Teams, it works for them and it works for me and that's been a real terrific fit and they're in there able to train me and mold me into the planner that they want me to be as long as I'm willing to put on my thinking cap and roll up my sleeves and pay attention to what they're trying to teach me.

Caleb Brown: Where do you expect to be three years from now?

Joshua Walker: Three years from now, I believe the calendar works out that I'll have racked up my apprentice hours and I'll have my CFP marks. In three

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years, the Kamar business will be wound down and dad will be off into the sunset of his retirement. That'll be so sad because it'll be 25 years in the Kamar business, the cow business at that point.

But I'll be able to focus, my daughter will be graduating college in three years. I'm intending so it'll be the real launch of the next phase of our life. Empty nesting and having the flexibility to devote the time as needed, whether it's mornings, evenings, weekends, to be full time making financial planning and tax planning, and fractional CFO work for the collection of clients that we've gotten in three years. I'm gonna hope that these will be clients, they'll be friends, that they'll know me for three years, I'll know them for three years and deepening relationships in the firm and in the local chapter. I'm intending to stay involved with the next-gen folks until they say, "Josh, it's been 10 years, you don't qualify, or go away," and help other people in my situation see that there's a path, and there's promise here.

Caleb Brown: Yeah, it happens to the best of it. I hated when I got that letter and said I was too old, kick me out. We've discussed this already. I mean just your challenges and hurdles of getting in the business, but you've been at the three months and I mean, it's limited exposure, but what's been the most challenging thing for you over the last few months?

Joshua Walker: That's easy. The real-life technology. In the books you read about, "Oh, you go and you do a raw conversion."

Well, if you got accounts that are at fidelity and you want to do a conversion over to Schwab, we've been at it for six weeks with this guy, and just step by step by step, and oh well, the money link doesn't work, and oh my gosh, the Schwab interface is, I don't want to be uncharitable, but it's primitive, and it's just the tech of why are these connections broken in e-money, they worked yesterday. So the real-life nuts and bolts of technology has come so far, but it's plain there's further steps to be taken to make this all be as seamless as possible as it theoretically ought to be. So getting my head screwed on straight with the software. I knew there's going to be a learning curve, and if it wasn't a heck of a learning curve—and going on still. More software all the time, so many webinars.

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Caleb Brown: This has been great, Joshua. I really appreciate it. I mean, just a lot of initiative. You stuck with it. It's paying off for you. It's amazing. And we'll have to have you back on after you've got a couple of years under your belt just to see sort of where you are as a check-in. But as we're winding down, I mean, just any final tips for any of the new planners out there looking to get in the business.

Joshua Walker: I think there's two things that it helps in advance to know exactly to the degree possible to have a good sense of what it is that you're looking for in the position and what's going to work for you. With the constraints of my wife's health and our geography, I knew that it was going to take a long time to find the right fit, but that it was still achievable. So if you know going in what your constraints are, whether it's geography or family or kids on the way or the fact that you don't have constraints. "Yeah, I could go anywhere in the United States. I'm willing to work in any channel." That's good to know as well. And the other thing is to know your learning style. If you're going through a CFP curriculum and it's not clicking, there's a lot of good options out there. There's different styles for different people.

I happen to be the sort of person to whom education comes easily. Yeah, you hear people say it, "Traditional schooling wasn't made for people like me. I'm not a good test taker," and at the other end of the spectrum, traditional school was made for people exactly like me and test-taking is the knack that runs in our family so that's why I signed up for the program that I did. But if you're in a program and it's not working, switch gears. That's an option. If something's not working educationally, there's good options out there. And keep listening to those podcasts, the Kitsis and Carl, the New Planner Recruiting. When I got sick of listening to my Dalton professors and the Dalton audio review, it's oh my gosh, I need to listen to Caleb and one of his 160 success stories to make sure that this is still something that's I remember why I'm doing what I'm doing.

Caleb Brown: Thank you so much, Joshua. I really appreciate the time. Thanks for coming on the show

Joshua Walker: And congratulations on the audio book. That's exciting. I'm so glad that it's not just a print and a Kindle, but you can listen to the book while walking your dog and cutting the grass

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Caleb Brown: Or training for your marathon, whatever

Joshua Walker: Or the marathon, yeah.

Caleb Brown: Thanks again, Joshua.

Joshua Walker: It's my privilege. Thank you so much for having me on. It's been great.

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.

Grab your copy of the Financial Planner Career Roadmap at
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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.