

Ep #174: Using Your CFP for an Alternative Career Path with Heath Jackson

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Caleb Brown

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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 174th episode of the *New Planner Podcast*. This is Caleb Brown, your host. My guest today is Heath Jackson, a business consultant and coach for financial advisors in San Antonio, Texas. Heath joins the show today to discuss how he uses the skills he has developed during his CFP, client advisor, leader and manager to help financial advisory firms with strategy and execution so they can continue to grow. Stay tuned to the middle where he talks about how he entered the profession and became a financial planner, how working in the RIA bank and insurance channels helped him build a broad skillset, how he found out that he loved consulting, and why it has been a great transition for him.

Stay tuned to the end too where he shares how he works with firms with some of the largest problems advisory firms face, what the characteristics that successful financial planners share, plus inside information for new planners on what some of the biggest frustrations their supervisors commonly cite. If you might be concerned that the

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only thing you can do as a CFP is become a client advisor, then this episode is for you.

Caleb Brown: Hi Heath, welcome to the New Planner Podcast.

Heath Jackson: Hey, Caleb. Thanks for having me.

Caleb Brown: You got it, absolutely. Looking forward to chatting with you more. I mean, we've known each other, I think we just figured out, it was 22 years.

Heath Jackson: It doesn't seem possible as young as we are, but I guess it's true.

Caleb Brown: I like that. Yeah. I wanted to chat with you. I mean, you've got a unique story, and I want to talk about some of that today. But maybe just start us off with: you've recently had a change within the last, I don't know, year, year or so.

Heath Jackson: Yeah, it's been less.

Caleb Brown: Less than a year, okay. Maybe just start us out with what you're doing right now. What are you doing and what's your role?

Heath Jackson: Yeah, absolutely. So I launched a consulting firm and it's purely for financial advisory practices. So if you think about a new planner coming in, and they're trying to get started, they're trying to figure out where they go, how they build - or you take a very established firm that's growing and doing well and there's just a part of the business that they need some help on.

It's either strategic help, it may also be execution and I tend to find that a lot. So I work specifically with advisory firms. About \$10 million in gross revenue is when they get a little too big to need my services. But anything below that, I find a way to help them. I discover what it is that

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they're looking for, and then I help them put in place the strategies to execute on it.

Caleb Brown: Gotcha. Yeah, that's really cool. And you were an advisor for - I mean, you came out of the same program, and we were in the same cohort, a long time ago. What makes you qualified to do this, and then why did you switch over to doing this from being an advisor?

Heath Jackson: Yeah, I learned about four years ago that my whole career has been developing myself to be a consultant. And I kind of, whether it's good or bad, I think it all leads back to me not being able to keep my mouth shut. So I have attained my CFP, passed the exam one year after college - which I couldn't pass it now if I had to - but while I was still fresh, worked with clients for about five years between two firms. And then went into a big corporate structure. Still working with clients for three years, worked directly with clients, had a book of business of my own-ish, as much as you can call it your own, in a conglomerate like USAA.

But I kept saying things like, "Why don't we do it this way? Or why don't we-", I'll just stop there. It's the why don't we. And I kept being the one that would get brought in to go fix it or change it or build it and I love that part. I love clients. I love the individual clients. I love helping them get to their goals. But I love more creating efficiencies and increasing effectiveness and how do we get more out of less? And so I think it started then with me not keeping my mouth shut. So I built a few teams that were specific to "How do we make this better?" I built a department that served as - I think it was before we really called it practice management, but that's what it turned out to be.

And then I couldn't keep my mouth shut and I ended up leaving the financial advisory space and went over to the bank - and I won't go into what all that entailed. But it ended up with me leading a team of about 250 people in a product that I had no knowledge about. But I learned

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some valuable lessons there when I asked this executive, “Why me? I know nothing about what you do.”

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She said, "That's why - I don't need people that are experts at this. I got all of them. I need people that can lead people." And that turned out to be a great space to be in, but I couldn't keep my mouth shut. We had some regulatory things going on and I said, "Why don't we-". And sure enough, I'm working on project management, trying to get the bank in order, with some of the consent order work from different regulators.

Learned a ton there. Yeah, I'll stop there unless you have any more specific questions, but it basically came down to: I'm seeing what clients want. I'm watching planners and advisors work and seeing what their issues are and where they're succeeding, and I never stopped trying to find a place for, "How could we do that better?", even in the bank where I didn't know what I was doing. I barely knew how to spell my own job title, but it was all about listening to people and what are you struggling with?

What are you doing well? Well, why don't we do that more? Why don't we do that less? So I got a call about a consulting offer and I really didn't know that there was anything in this space. And I said, "Yes, I want to do that." That's what I've been developing for my whole career. I just didn't know it.

Caleb Brown: Thanks for sharing that. There's a couple of things in there I didn't know, that was neat. A couple of key points, I think takeaways, at least that I had, I mean, kind of always asking why, why are we doing this or why aren't we doing that? I mean, that opened a lot of doors for you. It seemed like, and also helped you realize sort of what your skillset was. I mean, that's a lot of management or leadership. I mean, that's a big role. You come in and lead 250 people. I mean, had you led people or managed people significantly prior to that?

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Heath Jackson: I had, but in a different way. At that point, I had been a people leader for 10 years. So, that was nothing new. I love leading people - and getting ahead of myself, that's probably 50-60% of what I do for firms, is help them manage their people. Owners of firms, people that run firms, they don't know how to do this. They didn't get in the business to go build teams and delegate work and have accountability and share skill sets. They didn't do that. So I spent a lot of my time doing it.

Before moving to the bank and having the big team, I had small teams, but it was always a direct one-on-one leadership, direct reports. This was my first time. And really we didn't even have the model in my department of the skip level, of having direct reports and then they had direct reports. So leading people that I wouldn't even see except for maybe once in a month in an all-hands meeting or a big company meeting. But it was a first for me, but it wasn't out of the realm of what I had been doing.

Caleb Brown: Got it. So you did that. Then you went to, like a boutique consulting firm, did that for a while and that was focused just on financial advisors.

Heath Jackson: Yeah. That's where I realized that I had not fallen out of love for financial advisory. Now, I'll give you this, Caleb: getting your CFP, getting a degree in financial planning, I've never been more a fan of that than I was when I went to the bank, because even though I wasn't working with clients, it had nothing to do with assets under management, there wasn't the financial planning for an individual.

That skill set flexes to any role that you could ever do. The concept of the financial planning process exists everywhere in the world, even if it's not exactly what you go to school for. So, I just wanted to throw that

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in there. I was able to use that, but then getting into that consulting firm, that made me find that love again that I had for financial planning.

Caleb Brown: Yeah, I mean, that's an important point. I mean, the CFP is just so broad. Like you, to your point: I mean, you could be a lead advisor, you could be a consultant, you can do, technology, right now, like a job when we got out of school, you couldn't go to a fintech company and test out their products like, ah, this isn't going to work.

That role didn't exist. Now, CFPs are getting hired to do that. And I have to go talk to the engineer saying, you guys got to come up with something better. This is where this button needs to go. This is how it needs to float through. They didn't have stuff like that. So really cool. Okay. So you're with the firm for a while. Then you, I guess, went out on your own. Is that what happened?

Heath Jackson: Yeah. So we separated in April of last year and I just realized I wasn't done doing what I was doing. I mean, you know this Caleb: we built quite a network and, for younger planners, that's a very important thing. When you can build up a group, whether it's in your community, it's in your state, it's nationwide.

So many people I enjoy seeing at FPA conferences, so many people that I'm in study groups with. Whatever the case is, I just realized, those are my people, and I love those people. And so when I got out of that, I did not leave the firm with the intention of, I want to go do this on my own. I found out that I was leaving the firm, and then decided I wasn't done, if that makes sense.

And the natural fit was, how do I work with the people that I already know, trust, and love? And how do I maybe take advantage of that issue that I have, which is I can't keep my mouth shut.

Caleb Brown: I mean, just if you boil it down, that's the characteristic of a great consultant, right? It's like questioning everything. It's like looking

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at everything and giving that fresh perspective and fresh pair of eyes. And was the movie big? Is that one of the Tom Hanks reason? Like he gets that role, isn't there? Like, look at all those toys and stuff. And like, he just, I mean, it was like, yeah, that's exactly right.

Heath Jackson: I'm older than you are, Caleb, but I think of it as Columbo. Do you remember the Colombo TV show?

Caleb Brown: Yeah. I remember that.

Heath Jackson: He had the cigar and he, he was always trying to solve a case. But he always seemed like an idiot. He was the moron of the show. Everyone looked down on him, he just asked dumb questions over and over, but at the end you realize, "Oh hey. He had a lot going on in his mind and he also solved it." So I try to take that approach. I don't mind asking dumb questions. I put that in my core values, like, dumb questions are us. I'm going to ask them. I hope you answer them. And it's going somewhere.

Caleb Brown: Well, and if you don't answer them, it's going to be hard to help you. So that's...

Heath Jackson: But sometimes "I don't know" or "We're not doing that" is the answer I'm looking for. And that also gives insights to what we need to do.

Caleb Brown: Maybe just talk to us about the current firm. Is it just you or do you have other people that you work with? Internal people?

Heath Jackson: Yes. So as far as True Growth Consulting, that is just me. I'm a solo LLC, single member LLC, but I do work with another group. So Financial Behavior Keynote Group, I'm working with them because we're sharing ideas. We're all-

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Caleb Brown: Mary Carlson, Mary Carlson's group.

Heath Jackson: Yeah. Just talked with them this morning. They're doing some really awesome things over there. They've got 20-something plus professionals, mostly on the speaker bureau group, and they're doing some amazing things.

So I'm serving with them as one of the head consultants as they're working with their clients, right? They do a consumer side, but also a B2B business side, which I'm helping. So loving that part of it - but outside of that, it's just me and a lot of partnerships that I've built in the community, Texas mostly, but also nationwide.

Caleb Brown: So I'm a financial planning firm owner and I need some help with my people or getting more efficient or I call you. What happens then?

Heath Jackson: Yeah. So you call me. As we're deciding to work together, the first thing I want to do is ask a lot of questions. I take people through a leadership assessment and ask them a bunch of questions. Some examples of that are, "How often do you and your leadership team get together to talk strategic?" The answer is usually, "I don't know", "Never", "We try". And so I'll take those questions - there's about 30 of them on the assessment. I have never made it to the 30th question with an advisory firm.

At that point they realize, You know what? We're not doing that. We gotta be better. Even the top firms - I work with firms that are growing 20%, 30%, 40% annually. There's so much that they could be doing better, but they're doing great. So we basically decide on what are the one, two, three top priorities? They're usually similar. And then at that point, we move forward. I work with them on a weekly basis. We're meeting once a week. And then once we stop that meeting, they've got assignments. I've got assignments. And then we get back together a

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week later, catch up. How did it go? What needs to change? What's our next action plan for the next week?

And we keep doing that until they are done - which never happens - or we've done as much as we want to right now. Now I know I'm six months in, but so far everyone wants to stay right. Solving that first issue is never the fix, right? Everything is so connected. And if it were easy enough to solve one thing and then be perfect, then they would have done it already. So it's usually more intense and we still keep that relationship going because there's something else that needs to be worked on.

Caleb Brown: Well, it's a business. It never ends. I mean, like you just keep adding new challenges, new opportunities that require time and attention and strategy, so.

Heath Jackson: These owners are just like all of us, right? What I find is I need to clean my garage, which I can do. But before I clean the garage, I need to do that project that's out. But before I can get to that project, I've got to get this other thing done in the kitchen or the bath, so it extends throughout the whole house. But the one thing I worry about is my garage is not clean.

So they come to me with, I need to clean my garage. But before we even touch the garage, we end up in the backyard working on something because that's gotta be the first step. And what I tell clients is, don't hesitate to tell me that one thing that's on your mind right now, even if it's not part of the strategic thing that we're working on. We need to clear that up because that's what you're focused on - until we fix that, you're not going to be able to shift your mindset to the thing that you want to get fixed.

Caleb Brown: Yeah, it's a little bit just listening to you talk reminds me of like when clients like financial planning clients come in. It's like, "Oh, I need help with my investments" and you get in there and start doing the

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planning. It's like, Oh, whoa, you got a lot. You got a lot of others that are like, oh, there's a lot of other stuff over here. So love the parallels. So it sounds like it's going pretty well. Do you work with one person at a time or how does it work with the book of clients?

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Heath Jackson: No, I am at a point where I'm talking about capacity. What is my capacity? Would I say yes or not? But I've been very flexible in the arrangements that I've had and upfront with clients about what that capacity looks like. So it's not a one-to-one, but I think I do more of a compartmentalizing, like I'm going to focus on this client all day today because I need to build this out.

I told them that I would get this to them, and I want to get it to them for their review before we get back together. So I do find that. And I think it's like anything else, I'm looking at capacity. What can I do? How fast do they want to move? And I price it based on that.

Caleb Brown: And can you just talk about the price? I mean, is it like they pay per month or something, or is there a minimum contract?

Heath Jackson: It's been flexible. I'm becoming less flexible as I've got more clients, but I actually do hourly work for a firm because that made more sense. So I am more bespoke, right? You see the leather stuff behind me. I love the word bespoke.

I am more bespoke than other consulting firms in that I'll be negotiable. So in this case, the hourly worked better because it was going to be more project-based. Now it turns out we're doing pretty much all-time project. And I don't know if the hourly is going to end up being a better thing for them as we continue, because we're doing more work together.

But most of them are retainer-based and I price them on two models: I have a focused model and I have an enhanced model. One of them is twice as much as the other and that's the effort for them and for me, and the price is almost double.

Caleb Brown: I know it depends, but can you just give us a ballpark figure? Like what is consulting even cost?

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Heath Jackson: It's between \$2,500 and \$5,000 a month. So \$5,000 a month, that's the, "We're working on it every week. We're meeting every week. You've got access to every tool and software that I offer. We have a shared file space where we're working together." I'm building - I love Notion, that's my favorite software as far as collaboration.

So I'm building out operations manuals for clients right now. I mean, you know this. Firms have a dusty old printed out operations manual on a shelf in case a regulator walks in. But then they've got something somewhere - it's usually a bunch of Word documents and multiple different files that only the owner knows what that file structure means and how to find things.

So, what I'm helping them do is, when they've got a process that's breaking down, we stop and identify: what is that process? Who knows the process? What happens if you don't know the process? Okay, let's build that out and make it accessible to everyone. Let's put an owner on the process. Let's have that owner go in once a month and make revisions or changes.

Let's build training on that particular process. And if you've got a collaborative software that you're using there, you can lock it down to keep other people from adding it. You could also see time based, when was it updated last, what's new, right? You can create what's new in the operations manual section virtually or by AI, by doing it that way.

And then they're actually using the operations manual, which creates no need for a training plan because you already have it built out. It means that when something fails, we know why it failed. It was either someone or something. Usually, it's the owner - don't tell anybody that. That's how it works.

Caleb Brown: You've had a lot of experience managing, leading people, seeing new planners. At one point you were a new planner yourself

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and now you're working with these firms and kind of helping them manage and lead their people. What are you seeing? I mean, why - the people problems that these firm owners have, what's causing those? What are you seeing the most?

Heath Jackson: I think it's that the owner looks at this differently than the employee looks at it. And I'll give you an example on that: when you look at a successful owner of a financial planning firm, they're probably pre-CFP. That's becoming less and less true. But in general, they're pre-CFP. They were insurance people, they were investment people, they were something non-comprehensive. And their business shifted as that became more of an expertise, more of a profession.

And they still see an up-and-comer as someone who walks in, picks up the phone book, and starts dialing numbers. But then, if I ask them a few more questions, they also can tell me that they want a support staff. They want servicing advisors. They want backups, right? They want to be able to put more advisors in one relationship with clients. Because that's what the client deserves, and that's how you handle, and how you take care of a client. So, when I help them understand that they can't put this new advisor on a phone book and have them be calling friends and family, and going through the system of, "How many phone calls do you have to make to get a lead?"

How many leads do you have to have? They're seeing that in their mind as that's what a new employee should be doing. What I help them understand is they don't want their employees doing that. So, I'll come back to the example that I used for that, but on the other side: new employees come in wanting the full breadth of what the owner does. They want to be able to sit down and have this one-to-one relationship with a client, be setting in a meeting, solving all of their problems, going to the financial planning software, making some changes, and walking in with the big ah-ha to the client. They don't know how to do that. The

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owner's looking at them as, you haven't earned that, you gotta go bring in some clients.

That's kind of that mix mash that's happening. And even the best ones have some slight semblance of that. So what I help them do is put together this skills inventory, which helps them understand what are your people good at? What are you missing right now that you need? It's always a huge level that they're missing when you get the two groups together.

From there, you build out as much role clarity as you can. What roles do you need? What does this role do? If I put somebody in this chair and I call them a staff advisor or a lead advisor, what does that person do? What are they responsible for? What does success look like? And what does failure look like?

I like to tell owners, "It's about the question: yes or no." You need to be able to ask a yes or no question, and they need to be able to answer a yes or no question. That's very high level. Which question it is, it's not easy to figure out right now. But once you get those people in the seat, you can have this advisor focused on 100% client service, or they're focused on 50% client service and 50% business development. Now, what does business development mean for a new employee in an established and growing firm? Owners think it's a phone book. And new advisors think it's a digital marketing campaign, and then people automatically make it in, and now I can go sit down with them and help them understand why they want us.

And the more we spend on that, the closer we can get the two sides to come together, and then get that full understanding. So I know that's a long, detailed answer to the question that you asked, but it comes back to, it's not as simple as it may sound.

Caleb Brown: Yeah. And just based on your history and experience, I mean, what are the common characteristics that you see on team members,

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new planners, or these employee types that are hired? I mean, is there something they all have in common that leads to their success?

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Heath Jackson: Yeah. I think what they all have in common is they want to help people, and I got to help firm owners sometimes realize that. Like, I hear what you're saying, but it sounds like they are passionate about helping your clients. Is that true or false? If we can establish that, then we can make some great headway. So I think that they all want to help the client. They all have a desire to use technology. I hear of no examples where a new employee, new client in that generation comes in and doesn't want to learn new software, new technology, is not open to using something that will make their job easier.

I never hear that. The difference between some that are unsuccessful and the ones that are successful is knowing that technology is not the full answer, knowing that there's something that comes after the technology. It's the work ethic. It's the learning, it's the self-awareness of your own skill sets.

The ones that are successful are the ones that are able to decipher those things that I just mentioned. The ones that are unsuccessful are the ones that, they just want to search for the next tool. They just want to get in and be the technology vendor of the firm. They're very close-minded in learning what made that owner successful.

The relationships, the hard work, the traveling, the going out and giving the sales pitch here and there. The successful ones are doing that. And that can be done. A new advisor, fresh out of college, can walk in and start learning those skills, and can very quickly be seen by the owner as somebody who's got very high potential at the firm.

As opposed to someone that says, that's not really my thing. I just did my cornerstone project. And I still have the Excel file and I'm planning to put every client through that. That's how I'm going to help you. That's not what they're looking for.

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Caleb Brown: When you were managing people and leading these teams, like you said earlier, what was the most frustrating thing that your team members, what would they do that caused you to just want to pull your hair out?

Heath Jackson: I know we don't have enough time for that.

Caleb Brown: I backed you into a corner there. Well, maybe just think like what, what are some frustrations?

Heath Jackson: Yeah. Frustrations would be a difference in expectations. So, the leader having a certain set of expectations, and the employee having a separate set, and not being able to meet in the middle or not being able to get a clear consensus on what that expectation is.

So, just like I said, the question yes or no - the great employee relationships, that yes or no was either a yes or it was a no. Either one of those is fine. You're meeting expectations or you're not meeting expectations on a certain thing. Either one of those is okay. The maybe, the I don't know, or you didn't tell me, or I didn't think that was, all of that was the biggest frustration.

Now that led to multiple issues everywhere. So it led from issues to, I would say the biggest one was, "Wait, you spent a week building something that had nothing to do with what I had asked you to do?" So, one: they spent a whole week doing it, when they could have spent one day and then checked in. The other was, they had a different objective than the original one.

Now, it may sound like I'm saying it was all their fault. I'm not saying that. Many, many times, the communication was my fault, and I learned from good and bad leaders throughout my career how important communication is. Can I tell you a quick story on that? One of my greatest leadership lessons.

Caleb Brown: Yeah, sure.

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Heath Jackson: Okay. So, had one boss at this time. I say at this time - there were a lot of dotted lines at this company. So, you had multiple bosses, but this was my direct leader. We were in a half-day off-site. We were determining what we do. We were going through the “Who we are”, right? The mission, vision, core values of the team.

And one of my colleagues asked, so what is our mission? And the boss turned to her and said, “You don't know the mission? Okay, I'm going to ask everybody. Somebody tell me what the mission is.” None of us knew. And he finally said, “You know what that tells me? I've been telling you guys what the mission is of this team for seven months. And not one of you can tell me what it is? That tells me that I have seven people that are not listening.”

And that stuck with me, because there's never a time where seven people got it wrong. So, I will joke with groups sometimes, when I'm leading a group and I've got ten people in the room, or I've got twenty people in the room that all report to me, and nobody knows the answer, I sometimes start with the joke of, well, you know what that tells me: I got twenty people that aren't listening. But then, hey, I get it, if you guys don't know it, that's not your fault, that's my fault.

That's my communication issue. So, you gotta know enough to know that that's you. But that still comes back to what you had mentioned with the frustration. It's just having those communication issues, which turns into a performance issue, which turns into a, “Why are you here at this job?” It can be seen in a lot of different ways, but it all stems back to that.

Caleb Brown: You'd given us a lot already, but just any final closing tips that you'd have for - I mean, I'll let you go with both of them and the new planners, and then if you have a couple of tips for any of the firm owners that might be listening.

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Heath Jackson: Yeah, absolutely. I would say for a new advisor, know that the owner of that firm has not spent any time figuring out how to manage you, to develop you, to grow your career. They just don't know it. But here's the good news: they care. When I'm talking to these firm owners, they want that system. They want to know what they don't know. They want to be better at it because they know how important it is. And, I mean, they got into this business because they care for people. That doesn't stop at the client.

It flows to the employee. Let's look at it in a positive way. Maybe it's not a positive way, but if you looked at it from a positive standpoint, and you understood that the owner does care about you. Go figure out how to do the things, even if he or she doesn't know how to develop you. Spend time listening.

Ask those questions. Be willing to go sit as a fly on the wall in a meeting. Start writing down the things that that owner does and says. Ask the owner later, "Now you went into this story about ... what made you launch into that story right then?" There are things that this owner has been doing for 30 years that it'll take you 40 years to learn, and they're valuable skills that he or she may not even know how to tell you why, but if you can just spend some time learning and listening, you're going to pick up on a lot more than if you sit back and wait for this owner to deliver you the processes, procedures, training manual, the guide to, the all of that. Do that first.

From an owner standpoint, I would say it's exactly the same, but I mean, the message is slightly different. If you're that owner, know that this employee wants to be good. They want to continue down this path. They love where they're at, or else they wouldn't be there. They have no idea how to do what you're doing.

And if you can't tell it to them, then you need to spend more time working on how you would tell them the process. Right? I'm not even going to say documenting the process and creating standard operating

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procedures yet. What I mean is, sit down and try to figure out why you do the things you do, what it is that you do, and then you can start training those new advisors.

Don't let them sit there for a year without letting them or helping them understand why you do the things that you do. If you do, then they're just gonna see it as a character flaw on your part, and that you're just the guy that wants to tell stories in every meeting. You're not - there's a reason you tell those stories. Help that new advisor understand why you're doing it and why it's effective.

Caleb Brown: Hey, thanks so much for sharing those and coming on the show.

Heath Jackson: Hey, thank you, Caleb. Love what you're doing, sir.

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 newplannerrecruiting.com/roadmap.

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.