

Ep #175: Leading Marines to Leading Financial  
Planning Meetings with Andy Blacker



# NEW PLANNER PODCAST



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**Caleb Brown**

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## Ep #175: Leading Marines to Leading Financial Planning Meetings with Andy Blacker

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 175th episode of the New Planner Podcast. This is Caleb Brown, your host. My guest today is Andy Blacker, an Associate Financial Advisor at Delphinus Financial Advisors.

Andy joins the show today to discuss how he transitioned to the financial planning profession after 10 years in the Marines. Starting with why he left the Marines, how his fiancé got him thinking about a career in financial planning, and why he ultimately decided to take the plunge. Check out the middle part where he shares how he tackled the CFP coursework while still on active duty and passed the CFP exam on his first try.

Plus how he knew starting his own firm wasn't the best fit for him, how he narrowed down what he was looking for and found his current firm, what he is doing in his current role and how he and his fiancé were able to navigate a 50% pay reduction. Stay tuned to the end as well where he talks about how his military career and the skills he acquired have helped him become a better planner and starting to add value to a firm and only a few short months,

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plus some tips for new planners. If you're in the military and you're considering a career change, then this episode is for you.

Hey, Andy, welcome to the new planner podcast.

**Andy Blacker:** Hey, Caleb, thanks for having me. Appreciate it.

**Caleb Brown:** Always great to talk to someone in the military. So thank you for making time for us and coming on the show. You got a really cool story and that's why I wanted to have you on here and a success story for us. So why don't you start just by talking about it because you're a military career changer, right?

You came out of the military. So why don't you just talk to us about why you even joined the military when you were coming out of school a long time ago?

**Andy Blacker:** Okay. So I guess not really a crazy, interesting story. I guess maybe I played too much Call of Duty growing up. I always thought the military was interesting.

I liked it. I liked the challenge and kind of the purpose behind it. And so I always wanted to do that even in high school. I did ROTC at Virginia Tech, so I knew right away I was going to be in the military. Yeah, I did that for about 10 years and then got out in the fall of 2023.

**Caleb Brown:** So you mentioned Virginia Tech, you didn't go through the financial planning program though, did you?

**Andy Blacker:** Nope. I was a history major. So maybe sarcastically, it was super helpful transitioning to financial planning.

**Caleb Brown:** We do talk to history, English lit, some art majors and a lot of those have made good, successful transitions like yourself into the profession. So you got your degree and then you joined the Marine. So I'm just curious, why did you pick that branch versus the other ones?

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**Andy Blacker:** I guess it's a good question, maybe I thought it was the toughest, or I wanted it to challenge myself. And I'm just always interested in it. Maybe the uniforms looked sharp at the time, I thought, or something like that. But yeah, maybe I just wanted the challenge and see if I could do it.

**Caleb Brown:** And some of our other military listeners may not like this, but I do think they have the longest basic training, don't they? Don't the Marines, it's the longest to get certified or whatever. I mean, maybe it's not.

**Andy Blacker:** I think it depends on maybe what your specialty ends up being. It is multiple schools you go to. Yep.

**Caleb Brown:** Yeah. Okay. Got it. Well, thanks for doing that. And thanks for your service. Maybe just talk to us too about your career there because just in looking at it, I know when we were working with you a couple of years ago, lots of leadership. I mean, you had a lot of people that you were leading and dealing with. So talk to us about just your military career and how you got in these leadership and these command situations.

**Andy Blacker:** I was an infantry officer. So I was a platoon commander starting off. So in charge of 30, 40, 40 guys as a rifle platoon, then a weapons platoon commander.

So weapons platoon was the company's mortars, machine guns, and rockets, and then PCS multiple times all across the world, all across the United States. I was also a company commander a couple of times for a headquarters company at the regimental level, then a rifle company at 1st Battalion, 3rd Marines in Hawaii.

**Caleb Brown:** Well, and how many, I mean, when you're the company, I mean, how many Marines was that?

**Andy Blacker:** Maybe about 150 to 200, depending on the manpower fluctuations at the time.

**Caleb Brown:** What position did you have where you were leading the most?

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**Andy Blacker:** I was a company commander, so probably around 180, something like that, give or take.

**Caleb Brown:** What was that like? I mean, leading 180 people, how do you develop the skills and how do you do that successfully?

**Andy Blacker:** I mean, I guess the training is pretty good to get you there. You know what you're doing for the most part, and we still have a lot to learn. You kind of have a lot of the technical knowledge, but a lot of the practical, you know, putting things into practice, real-world experience, you learn a lot of that from your non-commissioned officers and staff non-commissioned officers who have been in the Marine Corps for anywhere from 2, 4, 15, 25 years, so they have a lot of experience to teach you. And it's a lot of that, learning from them, but also walking the fine line of learning from them, but not letting them walk all over you and kind of just being a limp noodle, kind of just figurehead.

**Caleb Brown:** Yeah, it's like you're the lieutenant, right? You're coming in and it's like you basically, at least my understanding, and you got the sergeant major over here that's been in the military like 30 years and like but really he's kind of answering to you. I mean, how do you deal with that as a brand new sort of lieutenant, second lieutenant coming out? I mean, was there tension there and how did you deal with it?

**Andy Blacker:** I didn't really experience much tension. I feel like we get a bad rap in a lot of military movies. We're all like the nerdy type, I guess, in the movies. But, I think coming in, kind of being confident and talking to him, not really as a superior, but kind of like an equal in a sense.

Like my platoon sergeant at first, he's kind of like a right-hand man. It's almost like a marriage in a weird way where you guys got to work together, walking the fine line of getting his experience, learning from him, but also kind of knowing when something doesn't sound exactly right and kind of tweaking that or not going with it.

And then also I found a lot of like, "I didn't listen to them," or say, "Hey, I hear you, but we're going to do this." If it didn't work out and I made a mistake,

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going back then I'm like, "Hey man, you are right. My bad. Next time I'll listen to you."

**Caleb Brown:** Collaborative diplomacy. I love that. Yeah.

**Andy Blacker:** I like that. I like that.

**Caleb Brown:** You called me on it 'cause I was actually thinking about like a Platoon or one of those movies or whatever. It's like, where the NCO is like, "This officer doesn't know anything. This is horrible. Everybody was killed." All right. Thanks for setting the record straight. So, I mean, you just kind of progressed up, it sounds like. And then what happened at the 10 year, you just got tired of it and just wanted to get out?

**Andy Blacker:** Yeah, tired is the exact word I would say. I was just kind of burned out, tired. I feel like I needed a three-month nap. I never deployed to the Middle East, but did four deployments all around the world. I felt like I was always in the field, always gone at some training event, never really home. So I kind of just wanted a normal life.

**Caleb Brown:** How did financial planning pop up on your radar?

**Andy Blacker:** So honestly, it was never on my radar at all until my fiance brought it up. I knew I wanted to get out. She kind of was helping me out.

I didn't want to—I could have stayed in 10 more years and just gotten a pension. I don't want to do that. I wanted to get out. She kind of helped me jump off the ledge and take the leap into a new career field. I always saved money and invested, at a very basic level, my whole life, nothing crazy, but she introduced me to the world of financial planning and I was like, "Wow, this is a career."

She introduced me to her uncle's financial planner who's a CFP in New Hampshire, talked to him, he gave me a lot of career advice. And then I basically just listened to a bunch of podcasts, took notes, emailed random planners who had their podcasts or did things, and asked them, "Hey, can we talk for an hour?"

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I learned a lot from them as well. I even sent a planner my resume. I was like, "Can I get a job?" And he was nice enough to coach me along. And so instead of just ignoring me, he was like, "Hey, don't do that. This is why."

**Caleb Brown:** Okay. Well, it sounds like you picked a good one there. So she's not a planner herself. She just thought it would be a good fit for you?

**Andy Blacker:** Yep. She thought it'd be a good fit for me. I was looking around at a lot of jobs and found I could get I guess a decent middle manager position somewhere, but I didn't really want to do that. And then it turns out I have an interest slash growing passion for financial planning and.

Well, I love it so far, and then she—so I was actually deployed just before I got out. I was deployed to Okinawa, Japan. That's when I was talking in New Planet Recruiting, and I think it was Jesse, getting out there, kind of figuring out what I wanted to do and see what jobs are available. I was looking at the CFP coursework and she said, "Just start it. It's never a bad thing to just get some education, just do it." So I owe her a lot, I guess. And now that I'm saying it out loud.

**Caleb Brown:** I think we're going to have her on part two.

**Andy Blacker:** Get me off here. She's more interesting, man.

**Caleb Brown:** That's really cool. That's awesome. So you started the CFP coursework when you were in Okinawa?

**Andy Blacker:** Yep, I was in Okinawa, started the CFP coursework January of '22, and then through Boston University, all online. I finished maybe two courses by the time I got home in June, and I continued the coursework after I got out.

**Caleb Brown:** So you were just doing that on evenings and weekends on your own—I know some in the military, they can work you to death, man. They work you a lot.

**Andy Blacker** Oh, I know it. Yep.

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**Caleb Brown:** College roommate who basically got out of the Air Force is like, “Man, I’m working like three jobs. They’re killing me here.” So you just tuition assistance, is that how you were using to pay for it or what?

**Andy Blacker:** No, I paid for it myself. Tuition assistance I think has some service for officers, especially you incur some service obligation. I didn’t want to fall into that trap and get stuck.

**Caleb Brown:** Holding handcuff. Yeah, we’ll pay for it, but then you got to stay 17 more years.

**Andy Blacker:** Yeah, exactly.

**Caleb Brown:** Okay. Gotcha. So you worked through this. I just want to make a point here because I have a lot of career changers that reach out and also knew like you were working on this while you were working full time and a demanding job and you had a lot of responsibilities. So, all right. So then you complete the coursework and then you take the exam. How’d that go?

**Andy Blacker:** Yep. So I completed the coursework a little over a year after I started. So maybe March of 2023. And then I started the review course through the Boston Institute of Finance, BIF. So I did that right when I kind of finished the coursework.

And I took the exam in July of 2023. Luckily passed it on the first try and put that behind me. And then I took a couple of weeks off, then went into studying for the series 65, which may be a little bit out of order, but then passed that a couple of months later.

**Caleb Brown:** And this is all while you were still full-time in the military.

**Andy Blacker:** No, I’m sorry. Yes, I got out of the military fall of ‘22. So I didn’t need to be half the coursework once I was out of the military.



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**Caleb Brown:** Was that at all scary? Like, “Hey, I'm walking away from this job, the only thing that I've known and my income,” and kind of for this something that I don't know if it's going to work out, just walk us through that.

**Andy Blacker:** Yeah, it was absolutely a challenge and maybe, I don't know if scary is the right word, but intimidating, I guess. I'd only known the military, and everyone's always like, “It's a tough world out there, people can't make it,” but then you think like 99% of people aren't in the military and they somehow make it.

So my fiance honestly helped out a ton. She's got a good job, and was very, very supportive. so we were able to take a step back in income and just kind of go for it.

**Caleb Brown:** Nice work on getting the coursework done and the CFP pass. And then you went right into the series 65. I mean, you could have said, “I'm taking a couple months off.” Why did you do that? Why'd you go with the series 65 instead of the SIE or some other license?

**Andy Blacker:** So I actually did the SIE while I was deployed just before the CFP coursework, I started that. I like the planning world more. I don't really want to be in sales or just pure investments. And maybe I'm thinking of it wrong.

And that's my interpretation of it, I guess, the different routes. I like the series 65 CFP, more like planning focus route than more kind of just like investments, I guess.

**Caleb Brown:** Got it. So you were looking at the RIA model, the RIA channel.

**Andy Blacker:** Yep. That's a better way to put it.

**Caleb Brown:** Yep. And then how did you, well, I mean, to be fair, there are RIAs out there that care less about financial planning and just only do investments, which is muddying the waters for newer people, it's like, I thought they were planning since you're like not all of them. Man, confusing out there, confusing world. So, well, that's why we're here. We have this

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podcast. I touch on that in my book too. Like, you gotta be careful when you're interviewing with these people, but okay so what position were you looking for? Did you have a feel for where you were going to fit in with one of these firms?

**Andy Blacker:** Really just, I guess, an associate financial planner. I was kind of just get my foot in the door, kind of learn about the industry. I knew I didn't really want a sales job.

I didn't want to cold calls and just bring in clients. I wanted to kind of be a part of the team, maybe like everyone working together and not really competing against each other for more clients or more sales, that kind of stuff.

**Caleb Brown:** So is that why you didn't pursue your own firm?

**Andy Blacker:** I don't think I really knew enough to start my own firm. And I think I knew that, I think that would have been a really steep hill to climb initially.

**Caleb Brown:** Well, I mean, it's your solo practitioner, you hang your own shingle. I mean, that's not a team usually, or it's just one person so. I remember when I first started the recruiting firm and even kind of being an introvert and some of that, I was like I need to talk to somebody, I need to just start calling people because I miss my office when I was working virtually by myself.

All right, so you're making good progress, and then you get the 65 and then you start looking for job opportunities, then I think we got connected. Just talk to us about sort of what happened next and getting introduced to some of these firms and finding the fit.

**Andy Blacker:** I guess maybe I'm mixing up the timeline a little bit or explaining it poorly. So I was already with Delphinus and Anthony before even having the coursework done, before CFP, before 65, so he hired me. Maybe took a big risk on me, hoping, "Hey, hopefully this guy can improve himself a little bit."

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**Caleb Brown:** That was late 2022 when you just got out of the military, right?

**Andy Blacker:** Correct. Yep. So yeah, he hired me brand new.

**Caleb Brown:** Yeah. Let's talk about that for a minute because usually, the firms don't want that. They want you to go do all this stuff so they don't have the risk, which is understandable. Just talk to us about the interview process and why he was a good fit.

**Andy Blacker:** So we interviewed, I was still in Japan when we first met virtually. Yeah. And I think it ended up going well, obviously. I'm still working for him today, happily working for him today, and again, I realized that the chance he took on me as a blank slate, hiring me without really proving myself too much.

At the time, I completed, I think, two courses at BU for the CFP program. I think he also kind of wanted a blank slate, so I didn't have any maybe bad habits or preconceived notions or something like that. So you could kind of teach and coach and mentor me into how you wanted me to be.

**Caleb Brown:** You mentioned taking a chance on you. I mean is that increased the loyalty maybe that you might have to someone like that and help you get your start?

**Andy Blacker:** Yep, absolutely. Yeah. I think at the time, as I learn more about the industry, I learn more about it. I look back and I'm like, "Wow. That was a big chance they took on me." And luckily I think for both of us it's worked out up to this point.

**Caleb Brown:** So what position did you start in? What were you doing when you first started?

**Andy Blacker:** So I was an associate planner and basically just being his right-hand man, we did everything together. I was in every meeting from day one, helping out and learning and observing and helping him with everything from insurance, investments, estate planning, taxes, basically being in receive mode all day, every day, and slowly learning and being able to

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contribute, which was nice after a little while of getting there and being like, “Wow, this is so much,” but now I'm doing much more now.

**Caleb Brown:** I mean, months went by before you thought you were contributing.

**Andy Blacker:** I think I was contributing up to my ability initially, but I kind of started getting my feet under me as I think I completed more classes through the CFP program and started learning more.

It's a fine line to walk. You don't want to contribute beyond your ability and mess something up for a client, but you also don't want to be like a liability for 10 years to the firm and not do anything until you learn everything.

**Caleb Brown:** So maybe like is it six months or something into it?

It's like, “Okay, I feel like I'm gaining this. I'm sort of helping out and they're not just having to like spend so much time with me,” where it's like, I mean does that make sense?

**Andy Blacker:** Yep. Yep. Yeah. It was definitely, yeah, I'd say maybe three to six months before I started really learning what's happening. And that's kind of a testament to Anthony's patience with me. He couldn't be as efficient and do as much because he had to teach me and maybe do things more slowly than he ordinarily wouldn't.

**Caleb Brown:** And talk to us about just the, I know you said your fiance had a good job and you guys could take a step back, but for some people that can't do that.

So they're scared to leave the BAH and all the entitlements that they get from the military to go into the private sector where their salary might be higher, but then they have a full board of expenses. So maybe for the people out there, how was that comparable to you? I mean, how big a step, did you have to take a pretty large step back?

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**Andy Blacker:** I just got promoted a major maybe a month before I got out. That wasn't anything special. It was just my time. But I just say that just because this, the salary became a third or a half of what I was making.

**Caleb Brown:** Okay. So you took a let's just call it 50% pay cut. So whether that's a major, is that O4?

**Andy Blacker:** Yep. That was an O4.

**Caleb Brown:** Okay. Got it. All right. I mean, you were progressing. I mean, you could have stayed another, what, 10 years and you'd gotten—was a Lieutenant Colonel or something and just kept working your way up, right?

**Andy Blacker:** Yep. I could have, but yeah, I just, I was done. I was mentally done. Wanted to call it quits.

**Caleb Brown:** And maybe talk about that for a minute. I mean, for all the people that are listening like, “Oh, we're going to lose our BAH or,” whatever it is, or meal plan or tri care or whatever it is. And I mean, how did you do that? I mean like, “I've got the confidence to make the switch. I'm leaving all that behind.” And has it worked out? And is it more rewarding?

**Andy Blacker:** Yeah, absolutely worked out. Absolutely more rewarding now. Honestly, for my fiancée, again, maybe you should get her on the podcast, but I don't think I would have done it if not for her. I think I'd still be in if I hadn't met her and she had convinced me to get out. She was in the army as well, but her skills' more directly transferred to the real world than mine

**Caleb Brown:** Gotcha. Okay. So you just, I mean, really just came down to her kind of pushing you, cut outside of your comfort zone, but we talked at the top of the show about all this leadership and you're managing all these people and you're having to deal with people who don't want to do what they're supposed to, or they don't show up or they need people.

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I mean, you probably had people coming to you for like the AER loans and all this stuff. And then that's transferable. So why? So, and maybe it was just tongue-in-cheek, but why do you think you didn't have transferable skills?

**Andy Blacker:** Obviously transferable skills in that sense. But I mean like the technical or hardcore financial knowledge that I learned through the CFP coursework that, you know, I didn't learn that obviously in the Marine Corps.

**Caleb Brown:** Oh, sure. Yeah. And I don't think anybody was expecting you to be a tax planning expert with zero experience. I mean, but being responsible for a couple hundred people's lives and millions or billions of dollars of equipment, and I mean that's a big deal. And most people don't have that experience.

**Andy Blacker:** Yeah, so I think like the general baseline of responsibility, hard work, discipline helped out a ton. I don't think I'm anything special in the military, but I think that kind of helped out a little bit going into the real world, you know, time management skills and discipline helped out a lot.

And I don't believe in discipline like ironing uniform, making your bed every morning, but in terms of like making yourself do what you don't want to do like studying before work or after work—or I was in Twentynine Palms in the desert studying for the SIE exam, which obviously didn't want to do but made myself do it were helpful in the transition.

**Caleb Brown:** Prioritization, I just shot a YouTube video on this because this is what we, the complaint we get back from firm owners. “These people don't know how to prioritize anything” and a lot of times it's not necessarily the candidate's fault, just a lack of communication and expectations. But just being able to prioritize all this stuff, you would not have been able to succeed in the military without some level of prioritization skills.

**Andy Blacker:** Yep. Absolutely. Yeah. And it comes with time 'cause I could prioritize things in the military easily. After being in there 10 years, I knew what mattered and what didn't. That took a little time to do when I transitioned to the financial planning world. I could prioritize, but I needed to know what was important, what wasn't in this new lens to do that more effectively.

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**Caleb Brown:** So how did it work for you to kind of be going from the guy in charge to the guy not in charge?

**Andy Blacker:** It was honestly weird and difficult in one way, but super easy in another, where I feel like I was always in charge of people and it was almost a nice change of pace to have time to be a little selfish now and only look after myself and my fiancée rather than like 200 people.

So it was almost nice and a breath of fresh air in one sense, but in another, it was very humbling experience where I thought I was somebody, you know, military, and now I'm just some associate who's learning and a very humbling experience to take many steps back and learn and be Nick the new guy and all of a sudden you learn two things and then you learn 10 more things you don't know as you feel you're taking two steps forward and three steps back, but kind of just keep going and getting there.

**Caleb Brown:** And you're not just any associate, you're the associate that's working on those clients and taking care of those people at your current firm. So how has your role transitioned? I mean, you've been there a year and a half or so. How has your role transitioned and what are you doing now?

**Andy Blacker:** It's transitioned in the sense where I'm doing more on my own. I first started off with, "Hey, run every trade by me," or, "We'll do trades together," and stuff like that. Now I'm probably doing 98% of the trades myself, that there's a complicated case or, "Hey, there's no way around this. We're going to take some of these capital gains."

I run those by my boss, it's running certain types of meetings as well by myself now, taking more responsibility, communicating with clients now without running things by him. But also I think having the understanding of he's giving me a little bit of leash and I don't want to hang myself with it. So knowing when to be like, "Ah, this feels wrong. Let's run this by Anthony and kind of get his advice on it."

**Caleb Brown:** We want to get more people like you in the profession. What is your suggestion on how we can do that?



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**Andy Blacker:** I think these podcasts like that's kind of how I got my interest at first, listening to these podcasts. So it's nice. Hopefully, I don't sound too delusional talking about myself on this podcast. Hopefully, it just helps somebody believe they can do it or get some advice or maybe just a little bit of interest in the profession. I think just getting the kind of word out there that it's a profession. I don't know really know how to solve that or crack that nut, but I wasn't even really aware of financial planning being a profession, especially the RIA route. I'd envision it being like, "Hey, big bankers at the big banks and big advisement firms."

**Caleb Brown:** We're all very thankful for your fiance and getting you over to us. But my concern is if it wouldn't have been for her, we never—you would have gotten over here. So like, I mean, all any career change, it's like, how do we get more of you guys to see this side of things? This has been great, Andy. Any final tips or anything you want to share with the New Planner audience that's listening?

**Andy Blacker:** I guess the one thing I guess I leave people with is just don't give up if you want to do it. I think multiple times throughout my journey, transitioning and even studying, there's multiple times where I was like, "Man, is this even going to happen? Like there's no way I can learn this. There's no way I can do it." And everyone has those moments, but you know, no one sees it. It's like Instagram. Everyone sees your high highs. No one sees your low lows. You don't post your, you know, you being sad on Instagram, but I mean, everyone has low times. Everyone can get through it.

Even during the CFP exam, I sat there and I was like, "Man, I'm going to have to retake this thing," I guess, but in my head, I was like, "I'm going to retake it if I don't pass it." So just keep working hard, don't give up and get through the tough times.

**Caleb Brown:** And in one final question, I mean, what's been the most joyous thing about this profession for you that's kept you going?

**Andy Blacker:** I think the client interactions. I really enjoy meeting the clients, speaking to the clients. We work with them a lot, so we're getting to know them. And them seeing you multiple times and asking about you, saying hi, and us helping them.

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And them coming to us with a problem and us fixing that problem and seeing them, and their faces be like, “Wow, now I feel better about this. This is a problem solved.”

**Caleb Brown:** Andy, we appreciate your service, sir. Thanks so much for coming on the show.

**Andy Blacker:** Thanks for having me. Appreciate it.

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](http://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.