

Ep #220: 8 Months into a Financial Planner Career with
Malee Turner and Jessie Doll



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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 220th episode of the new planner podcast. This is Caleb Brown, your host. My guests today are Jessie Doll and Malee Turner. Jessie's a co-founder and Malee is an associate advisor with Reframe Wealth in Fairfax, Virginia. Jessie and Malee joined the show today to share their respective career paths.

Jessie shares how she started her career in banking, worked her way up for 10 years before starting her firm and building it from the ground up. Malee shares her own journey, starting with graduating from a CFP program and choosing to work at a smaller firm. She also gives insights to how her role responsibilities and confidence have grown over the last six months and what she hopes to do in the near future.

Stay tuned to the end for tips on building trust and confidence with clients and working effectively with a senior advisor. I hope you enjoy this episode with Jessie Doll and Malee Turner. Hi, Jessie. Hi, Malee. Welcome to the new planner podcast.

Malee Turner: It's great to be here.

Caleb Brown: Great to have you both. Thanks so much for coming on. I know we were trying to get this scheduled for a while, but this is going to be exciting episode because you both have really cool stories and Jessie, I just want to start with you on how you got into the business. Maybe just go back if you would, how you got in the business and how you worked your way up to co-founding Reframe.

Jessie Doll: Sure. So I started working in financial planning kind of by accident. It wasn't really my intention. But it was my first job and I needed the health insurance. And

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I decided to stay because it turns out I really liked it. I liked solving the math problems and I particularly liked helping the clients that I got to talk with.

So that was why I stayed doing financial planning. I worked at a couple of different firms kind of increasing in responsibilities and the clients that I was working with. And then in 2021, my business partner, Mitch Falter, and I decided we were going to try to do it on our own. And so that's when we started Reframe Wealth.

Caleb Brown: Gotcha. That was bold. Starting a firm in 2021. That was really bold.

Jessie Doll: You didn't know how bold it was when I was doing it, Caleb. It's like looking back. I'm like, "Wow, that was really, that was a big jump." Yeah, it was, but we just felt like I really wanted to be able to help clients in the best way that I knew how.

And it turns out that building our own firm, what worked best for me, right? And for Mitch to be able to really like design it from the ground up and figure out how can I build this thing so that it only serves the client's best interest and we can support them in the most direct way possible.

Caleb Brown: So I'm going to go back for a second. Just talk about the channel and Malee, we're going to come to you, but it was the bank channel, right? And how did you get started? What channel were you in?

Jessie Doll: So I first started in banks. and then I switched and worked for a TIA. So a big kind of corporate advisory firm.

Caleb Brown: Got it. In the end, how many years of experience did you have between those two companies before you launched the reframe?

Jessie Doll: About 10, 10 years.

Caleb Brown: All right. So about 10 years in the business and you said, "Look, we're going to do it our own way because we just feel like that works best and how we want to serve the clients." Did you start from scratch or were you able to have any client relationships that found you, or if you were under a non-solicitor or something?

Jessie Doll: So we were under a non solicit. So we started with zero. We did have some clients who found us, which was great. And it's a different practice, right? Like when you do it on your own, you really got to work on referrals and really cultivating, getting in front of the right people.

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Caleb Brown: Gotcha. Okay. Malee, let's bring you in. So you're brand new to this. You just got started. So fill us in on how you got started and how it's gone so far.

Malee Turner: Yeah. So growing up, I wanted to be everything under the sun. I wanted to be a news anchor. I wanted to be a surgeon. I wanted to be a dentist, but it just so happened that during the time of college decisions, I wanted to get into finance. And so I stuck with that. And I knew that Virginia Tech had a great financial planning program. And so I decided to major in that. And I've stuck with it ever since. Summer of junior year, I interned for this company that was more sales oriented and insurance based. And it wasn't exactly what I was looking for, but I decided to continue working with them anyways.

But I decided to keep my options opened and I stumbled upon your message on LinkedIn and you introduced me to Reframe and I met Jessie and Mitch and thought that they were cool people and decided that this would be a great opportunity for me. So that's why I'm here today.

Caleb Brown: Jessie and Mitch are really cool. I can vouch for that.

Malee Turner: It's true. They're the best mentors ever.

Caleb Brown: So Malee, that's really cool. Thanks for sharing that. You said you stuck with the financial planning, the insurance channel. Talk a little bit more about that. You said, "This isn't exactly what I wanted or thought it was." Can you just expand on that a little bit more why wasn't exactly what you thought it was?

Malee Turner: It just didn't really align with what I wanted to do in life. I wanted to go more down the path of fiduciary work and working for an RIA and the firm that I had previously worked with, no one really had their CFPs and it was more selling insurance, which—it's just not what I wanted to do.

Caleb Brown: Okay. Gotcha. All right. And Jessie, let's just come back to you. I mean, you guys are, here you are, let's see, 2021, no real clients starting from scratch. Why hire some, I mean, you guys really built the business if you were in a position to hire someone. So maybe just talk a little bit about like sort of the risk that's involved. I mean, here you are three or four years into it and you're already bringing on staff overhead. So maybe just talk us through that.

Jessie Doll: Sure. Yeah, that was a hard decision to figure out when, you know, two parts of the decision, right? When is the right time to bring somebody on and then who is the right person to join the team?

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With such a small team, having that personality fit is really key, right? Because we spend a lot of time together at the office and working on cases. Mitch and I decided to look for this associate advisor position because we really wanted two things. We wanted to make sure that our clients had enough support so that they could always have access to someone here at reframe who can help them. And also because we wanted to make sure that our practice continues to grow and that there are different levels and careers that people can pursue at reframe.

We always joke, it's not the Jessie and Mitch show. It's about our clients and about what we are cultivating for the people we serve. And that includes our staff. So I think making that decision was like, we were busy enough and we could see that if we kept going at that pace, it would get to an untenable point of view, and then we'd start to drop balls and we didn't want to do that.

Caleb Brown: And maybe just, if you could go back. Approximately, how many client relationships did you have? Just so we have sort of a way point on where you were when you brought Malee in.

Jessie Doll: I think probably maybe 180 or so households that we're serving, like maybe about 300 million, something like that, AUM.

Caleb Brown: You said one 180, 180 clients,

Jessie Doll: 180 households.

Caleb Brown: Okay. Talk to us about how you started from scratch and then, so four or five years later, you're at 180 clients, 300 million. I mean, some of our listeners are very interested in that. How did you do that?

Jessie Doll: We just worked really hard, I mean, I think, I don't know. I wish there was some secret sauce of, "Oh, here's the recipe." I think in every interaction, we were trying to make sure that people would feel like they were well cared for and would know the professionalism that was being brought.

I feel like sometimes with small firms, there's a concern of like, "Well, but what happens if something happens to you?" So we did a lot of thinking and preparing to make sure that we really were prepared to help clients. And really the thing that's driven our business has been referrals. People tell their friends, they tell their family, you know, "Reframe's a little bit different. It feels comfortable here." It doesn't—I think those are things that people really grab onto.

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Caleb Brown: And when you say, maybe just expand on that one, “Hey, things are a little bit different here.” I mean, what does differentiate you from another fee-only RIA firm?

Jessie Doll: Neither Mitch or I came to finance. That wasn't a direct route. So we have kind of a different background. My graduate degrees in international development, his undergraduates in international development. And I think one of the things you can feel that's different about Reframe when you walk into our office is how we dress. We wear sweatshirts a lot.

I have like Reframe stuff on my sweatshirts and on my pullovers and we really want to make people feel like they're talking to a peer. We have deep understanding of what's happening in finance, but there can be a power dynamic sometimes of what it feels like to sit down and talk with a financial planner. I had a client one time tell me they felt like they were going to the principal's office. You know you come into my office and I close the door and *ooh*, now you're in trouble because you're gonna tell me about all your money.

And so we really wanted to make it feel more inviting. We have a kind of a national park theme happening. It feels different to me.

Caleb Brown: I had a, I'll just say it's a relationship in the industry, a long time ago when I got started and someone was coaching me and telling me like, “Yeah, you make the client or the prospect wait in the waiting room for five or 10, wait a long time so you can show that you're in—” I'm like, “What? No.” I'm walking out of it. I mean, like I had someone in the industry tell me to do that. Isn't that crazy?

Jessie Doll: Yeah, it makes me happy because our clients come and, you know, I'll make the coffee for them or whoever like it's just, it's we really want it to be a flat atmosphere of like, “We're you're hosting you at our office. We want you to feel comfortable here.” It's fun.

Caleb Brown: Okay. Malee. So Jessie may have just answered this, but I mean, here you are at Virginia Tech. You've got tons of Northern Virginia firms coming down there and visiting national firms. You got Vanguard, you got big asset managers, you got insurance champ.

I mean, you get all of these people. Why go to a, I think at that point it was a three person firm, why go to a small three person firm instead of a big, huge firm where you can have all these water coolers and all these softball games and laser tag and ping pong and cornhole and all this stuff. Like, why do that?

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Malee Turner: I wanted to be a big fish and a small pond, and I thought that working for a smaller firm, I would be able to grow more. I realized that Reframe Wealth had a lot of room for growth. And having that one on one relationship with Jessie and Mitch let me to be able to learn a lot from them, and I believe that having a great mentor is the key to success in this profession. And joining Reframe Wealth, I was kind of pushed into the deep end, but I was kind of pushing the deep end with a yacht, I would say, because the support from Jessie and Mitch has been great. I've been working with our accountant, our elder care consulting team, our investment team. I've been sitting in on meetings, participating in on meetings, making financial plans. I've been doing it at all, and it's been great.

Caleb Brown: That's amazing. Jessie, just talk, maybe like introducing someone who's brand new, doesn't have a lot of experience out of a good school, good education, and it was a great hire and great candidate ... introducing them to your clients. I mean, just, that's a big decision.

So why did you do that? And then how did you do that?

Jessie Doll: So we did that because I think it's really important for Malee to get the immediate experience with clients so she can see how Mitch and I work with our clients. I think you just learn better by doing. And so for her to be in the room with us, I think is really helpful.

And our clients like it because then they know if Malee answers the phone, they can put a face to it and know her, right? And she's a valuable member of our team. So I want her to be there and share her perspectives with clients. Malee just finished school. So she finished her training a lot more recently than I finished mine.

There's new information out there that she has that I think is important for people to also hear about. So we definitely want her in the room as often as possible. Also so she can start to learn kind of the reframe way of doing things, how do we answer particular questions, and then oftentimes when Malee first started, she has taken notes and she was actually taking notes more on how we were running a meeting rather than the client situation.

So she's coming to me afterwards and saying, "Hey, why did you answer it that way? Tell me more about this. I didn't understand." And that's an awesome way for us to teach, right? Because then it's super efficient. I'm doing the work with the client, and then Malee has specific questions about that afterwards.

I don't think we'd get that level of efficiency if I had to then summarize a meeting for her and then have her ask questions separately.

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Caleb Brown: Yeah, I really liked that. It sounds like she's driving a lot of the mentorship stuff versus just sitting back and I get asked all the time to be in the parties, mentor thing. And a couple of times I did it and the mentee's like, "Do something, mentor me." And it's like, "No, you've got to come part way," right? Versus just sitting back. So, and let's just take a step back. I mean, why did you hire Malee? Why did she stand out?

Jessie Doll: The thing that stood out the most to us with Malee was how prepared she was. So we'd have an interview and we had a list of questions and then Malee would have a list of questions about what she was wondering and thinking. And that really showed us we want someone who's curious, right? Who wants to figure out the answer. You don't need to know all the answers, but you have to be able to ask the questions.

And so we really love that about Malee. Her training, I mean, she understands the financial planning field, she's asking educated questions, which is really wonderful. So she had kind of the preparation on the book side of it, but also the personality piece of really wanting to engage it and know more and that put Malee above the other candidates we were working with.

Caleb Brown: Malee, if you would just talk about some of the biggest successes you think you've had thus far and maybe some of the challenges.

Malee Turner: One of the biggest successes I had so far was passing my CFP exam in November.

Caleb Brown: Nice work. Tough exam.

Malee Turner: Yeah, I was super nervous for that exam, but all my hard work paid off and Jessie and Mitch's support really helped. My biggest struggle has been participating in client meetings. And I've done a lot of mock meetings with Jessie and Mitch and I feel more prepared for meetings now. So that has been another great success because I do want to become a senior advisor one day and I just wanna excel in this position and not only make financial plans but also be able to present them to clients and build those meaningful relationships with clients.

Caleb Brown: Gotcha. And maybe talk about how your role has changed since you've been there. I mean, what is the role progressed into?

Malee Turner: At first, like Jessie was saying, I was just sitting in on meetings, taking notes, asking Mitch and Jessie, "Why did you present it this way and not that way?" But now, they ask me, "How would you present this to this client? What would you do in this

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scenario?" And at first I was beginning to get to know the software we use. We use MyGuidePro and now I'm able to make financial plans from start to finish.

Jessie Doll: Can I just brag on Malee for a moment, Caleb? Not only is Malee making financial plans from start to finish, but she's finding errors in MoneyGuide.

She came to Mitch on a Friday and was like, "Hey, I think this needs to be changed." And it turns out she was exactly right. So she's using her skills to point out things that are adding value. So that's wonderful.

Caleb Brown: I would just want to make sure I heard that. So there was an error with the software. Like you went back to the—

Jessie Doll: No, an error on how we were using the software. It was like an error. And so she came to Mitch and was like, "I think this is wrong." So she was right. We fixed it.

Caleb Brown: Malee, a lot of your peers would be, even if they found that, may not have the confidence to approach their bosses to say that, why did you do that?

Malee Turner: Just because Jessie and Mitch make this work environment so comfortable. I felt comfortable enough to be like, "Hey, I think there's a mistake." Also getting over that hump of the fear of confronting your boss or asking your boss's questions, like you're just going to have to do it and it gets easier from then. Just keep doing it. Just keep asking questions

Caleb Brown: That certainly comes from the top, right? It's a cultural thing. Since I know Mitch and Jess, like, "Yes, we want, we invite that." I mean, that's one of the first things they told me and not all their peers are like that, that have other firms. So it's like, "What? You're telling me I made an error in this." I'm like, "No, that never happened. I didn't do that."

Malee, just to stay on this MoneyGuide Pro thing 'cause I know we have a lot of listeners that this is the role they're going to be. I mean, how many plans do you think it took in MoneyGuide Pro for you to start getting a groove and feeling good about where the data went and how to massage it and some of the reporting items?

Malee Turner: I don't think it took that many plans to get into a good groove for me personally just because my very first plan, I took a deep dive into it, into what each button did, what each thing meant. And by doing that deep dive, I got really comfortable with how the software worked, and that was super helpful. But I think I've made or

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worked on at least over 50 plans by now and I would say I have a pretty good grasp on MoneyGuide Pro for sure.

Jessie Doll: Malee also calls MoneyGuide Pro when she has a question. I mean, talk about like proactive things. I hear her call them first and then come ask us if there's something that's still unclear.

Malee Turner: Yeah, they have a super good support system so.

Caleb Brown: Thanks for sharing that, Jessie. I just want to come back to that, Malee 'cause where did you learn that? I mean, I deal with a lot of Gen Z and college students. And I mean, here's the feedback I get from some other clients like, "Hey, they came to me first." It's like, "No, you go try to figure this out then come to me if you have no other—" Why did you pick up the phone and call MoneyGuide Pro versus just walking into Mitch or Jessie's office saying, "This isn't working. How do I fix it?"

Malee Turner: I don't know. I've always been a pretty independent person. If I can try to figure it out myself, I will before going to Jessie and Mitch.

Caleb Brown: Okay. And then talk about, so it's 50—I mean, that's a lot of, I mean, you've been there, what, six, seven months. I mean, you're doing a lot of planning.

Malee Turner: Yeah, I am. I routinely update each client's plans and for our new clients, I'll make them a new financial plan.

Caleb Brown: What about, so maybe just walk me through a scenario. I'm a new client. Do you call me and get all the data or what's your interaction with the clients on the planning side?

Malee Turner: We'll usually have a discovery meeting and I'll accompany Jessie or Mitch in that meeting and we'll have a set list of questions that we need to get from the clients and I'll input all of that data into the MoneyGuide software and that usually takes around a week and then we'll go over strategies together for the client and then present them the plan.

Caleb Brown: And then what's, and maybe there's a question for both of you and whoever wants to go, but what's the next step for you, Malee? What are you working on? What are you working towards?

Jessie Doll: So Malee and I talked about her goals for 2025. And some of the things that we talked about where she's, I'm going to sit for her series 65 exam.

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And she talked a little earlier about how she wants to be, you know, participate more in meetings. And that's one of the big goals is to, if you think about the flow of a meeting, start picking out pieces that Malee can be the voice to the client. Right now, oftentimes, I'm doing a lot of the talking and occasionally, Malee will add something.

And so we really want to change that dynamic so she's speaking more in meetings. So that's another one of the goals. Malee, I think there was one more.

Malee Turner: I want to participate more in pro bono work. Reframe does a lot of pro bono work, which is one of the things that drew me to the firm, I think. We were working on me mentoring—what was that program?

Jessie Doll: It's the mentorship program with Bright Paths. That's a firm we volunteer with a lot.

Malee Turner: Yeah.

Caleb Brown: Okay. Awesome stuff. As you look out, Malee, your career, I mean you said, I think you want to be a senior advisor at some point. I mean, have you thought about if and when the time comes where you're actually going out there and having to get the clients like Jessie and Mitch have?

Malee Turner: Yeah, I have. And right now, I think I'm kind of playing the long game where I'm planting the seed, building good rapport with people, building good relationships, and when the time comes, hopefully, those people will become my clients.

Caleb Brown: Well, I mean, again, like we've talked about this before and Jessie can share too, like you do this long enough and you talk to enough people, they ask you what you do.

I mean, and you've said the spiel enough times, it just sort of rolls off your tongue. And if people generally like you and you're over here doing pro bono and involved in the community, they're open to hearing about and they're interested. And that's how a lot of these people get clients. Jessie, what are your, I mean, is that sort of what you see and how you've done it?

Jessie Doll: I think Malee will excel at that when she gets there because of her caring nature. Like you have to know the numbers inside and out and she knows those numbers, but also you can tell she cares. And I think that's one of the things that people are looking for. When we think about business development, so much of it is just people telling their friends and family. And I feel like a meeting with the senior advisor, Malee, I

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feel like someone would walk out of there and need to tell their friends and family about this wonderful solution that's available.

Caleb Brown: Are you, I mean, just asking on the—are you calling the clients, Malee, and asking them for information and data and working with their other professionals?

I'm just trying to get a better understanding for sort of your role. I mean, just only six months in, I mean, you're doing a lot already and just how you've been able to develop the confidence to do that. 'Cause I remember my first couple of months on the job, I was afraid to call anybody. I don't know what I'm doing, So how have you overcome that?

Malee Turner: Yeah, so I currently call clients, we have a pre meeting call where I'll ask them what they want us to have prepared for this next meeting, if there were any updates, stuff like that, and I guess I have the confidence to do that just because all the clients we work with are awesome. I've never had a bad experience, and Jessie and Mitch make me feel prepared enough to be able to get on the phone and ask them what they need.

And my fear is that I'll be put on the spot and I won't know how to answer a question. But I've learned that it's okay to not know everything and not everyone knows everything. So, I guess that comforts me and helped me get over my fear of calling clients and answering their questions.

Caleb Brown: That takes some of the pressure off, right? It's like, "Hey, we don't know, like we've been doing this a long time. We don't know everything." So what, and maybe just role play that for a minute. So you're put on the spot, client asks you something. What are you going to tell them?

Malee Turner: I'll always go back to the, "That's a great question. Let me get back to you on that. Let me do some research. Let me ask Jessie and Mitch." Stuff like that. Yeah. And then I'll do the due diligence and get the client what they need.

Caleb Brown: Jessie, I want to come back to something you said, or you were talking about trying to help sort of get Malee more, I mean, very intentional about getting her more involved in meeting.

I mean, is that like, "Hey, here's one of the agenda items. I want you to take this," whether it's the college planning or the client's cashflow. I mean, is that what you mean?

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Jessie Doll: Yeah. That's exactly it. Because I think it's, personally, for me, I think it's easier if Malee knows her part so that she can really focus on that and feel well prepared for that and know that the other things I've got, right?

So she, so if we kind of isolate, like, "Okay, I want you to go through the Monte Carlo with the client." She's the one who's built the plan, so she understands it very well. And then she can practice. I think so much of what we do, you just have to get the words in your mouth the right way. So you got to say it a couple hundred times before it feels normal.

So yeah, we are being intentional about this specific part of the meeting and then shifting that around so she can kind of grow her confidence in all aspects of the meeting.

Caleb Brown: This has been great guys. I mean, just. Malee, congratulations on your progress thus far. I mean, and maybe what are some of the next steps? Maybe Jessie, we'll start with you. What are you guys working on? What are the next steps for you and Malee and Reframe?

Jessie Doll: Next steps are to continue to grow and make sure Malee feels like she's supported and has what she needs so that she can continue to grow. I mean, that's how Reframe grows is, right, when our staff continue to excel in their areas of expertise, continue to help families that need help, people who think they could never talk to a financial advisor. Like we want to talk to them, you know, "That's okay. We can have a conversation even if it's the first time that you talk to someone." Yeah. So I think those are our goals.

Caleb Brown: That's an interesting niche. I mean, kind of what I just heard was people that maybe don't feel like they have a complicated situation or enough money that would never consider a planner. Like you're interested in talking to that group of people. Did I hear that right?

Jessie Doll: Yeah, because there's a lot of people. Well, there's a couple of things there. So on the pro bono side, we want to help people who need help because they've never had access to a financial planner, right? We are skilled in serving people and so we want to be able to serve that community. And then on the work side of things, there are people who are close to retirement and have never talked to someone because they don't know what to say, or maybe they've done it wrong.

Caleb Brown: It's intimidating 'cause everybody's wearing a suit, not a sweatshirt,

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Jessie Doll: Some guy wearing a suit, right? Those people who feel like they're not sure what to do, we really want to continue to create an environment where they can come in and feel like, "Oh, wow. Okay. I do understand more than I did before. And there's a path here to figure it out."

Caleb Brown: Jessie, for you, then Malee, if you want to as well, I mean, what would you say to, especially some of the firm owners that are out there, some of your colleagues, like, "Jessie, why are you doing all this pro bono stuff? Focus on your business..." I mean, like, "You're taking away time from your clients. Why are you doing all this?"

Jessie Doll: Oh, I think it makes us much better financial planners. We do complex financial planning, and when there is no room for error, there's no room for error, right? And you learn that on the pro bono side. I think the other thing is we want to participate in our communities and all the aspects of our communities.

And that means we are serving various people. And pro bono was always important. Volunteer work was always important. And I think one of the really cool things about being a financial planner is that you can take your skill, the thing you are paid to do and help other people, right? Lots of people can cook a meal and that's an important way to serve the community also.

But this is the thing that I am most highly educated in and I can take that exact thing and help someone who would not have access to that otherwise. I think that's really powerful thing to do. And I think the other point I would make is when we were hiring, many of our candidates asked us, "What kind of pro bono work do you do?"

So from a very selfish point of view as a firm owner, I think you will get better candidates and more engaged staff if you are actively encouraging that and all that work, the pro bono work we do is all during business hours. It's not something we're asking our staff to do on nights and weekends unless they want to, but it's happening during the day when they're here at work. So we want to make that really easy for them.

Caleb Brown: That's great. And I know the CFP board has really been sort of pushing that. And I think I just got a recent email from saying, "Look, we're trying to expand this and we're going to give you all that, you have to put a badge on your LinkedIn profile," or whatever, just really try, I mean, it's great. It's really trying to get the word out and do this because there are a lot of people out there that need this.

Jessie Doll: The Foundation for Financial Planning has a lot of resources on their website. Sometimes advisors can feel like they don't know enough. And so the Foundation for Financial Planning has got some great resources for how to connect with

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pro bono work. There's a class you can take for CE credit. And they also have a matching system. So as an advisor, if you wanted to work in that area, you could go onto their website and find some good resources there.

Caleb Brown: Great resource. We'll link to that in the show notes. Malee, what about you? I mean, you've already done as we talked about a lot in the last six, seven months. I mean, what else is on the horizon? What else do you want to try to do in the next year?

Malee Turner: The next year, Jessie said, I do want to pass my Series 65 exam. I do recommend taking the exams as soon as possible. Try to get them out of the way as soon as you can. I also do want to, like we've been saying, participate more in meetings, gain more confidence in myself and in the work I'm presenting, being able to be put on the spot and know how to respond to clients' questions.

Get more involved in the pro bono work we do because it is very fulfilling. And the pro bono work we do, these people are very engaged. They ask very good questions. Questions that I've never heard, questions that I even have, I have to come back and research them or ask Jessie and Mitch. So definitely get more involved with pro bono work. I think those are the goals I'm going to put for the next year.

Caleb Brown: Those are great goals. I don't think I've ever heard anybody say, "I want to be put on the spot more and get more comfortable."

Malee Turner: I do. I do. I need to be more comfortable with being put on the spot.

Caleb Brown: I think I've shared this before, but when I did Toastmasters years ago, there's part of the meetings, I think they still do this, they call them table topics, where, you know, a lot of the program is you're supposed to give a prepared speech, multiple links and everything, but they warm up and they have partner meeting where you have a note card and you write down something and if you get chosen, somebody reads something off that note card and you have to talk for two minutes on it.

And it is brutal, but it'll help you get prepared for being put on the spot. That's the point. So we'll link to that as well. So just check that out. And I know other people, and there's lots of other programs. That's just one that I went through that I felt did help because that's the job that you're signing up for.

When you hold yourself out as a comprehensive financial planner, fiduciary 1940 act, the phone rings, you have no idea what they're going to ask about, right? I mean, you

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got to have a really broad and now even as every year that goes by deeper, it used to be broad and kind of shallow. Now it's broad and like deep.

So it's all hard. It's a hard job, right? Which is why it's rewarding and fulfilling. You can make money at it. So anyways, it was just cool to hear you say that. So as we're winding down, Malee, I'll start with you. Just any final tips for new planners. And then Jessie will come to you.

Malee Turner: Wherever you're at, whatever you're doing, be a sponge, grasp as much information as you can, and you always want to be a little bit uncomfortable. Because if you're comfortable, then you're not growing.

Caleb Brown: I'm with you. Love those. Jessie, what about you?

Jessie Doll: So I would say if you are getting started in this business, I would spend a lot of time knowing all the numbers because that's a knowable thing, right? To figure out as much as you can of CFP, prep, and things like that.

And then when you're coming into work, have that mindset of curiosity, right? And make sure you're asking the questions like keep asking the questions until you really understand it because at some point you're gonna be the resource, right? Like someone's gonna be looking at you and saying, "What do I do with my million dollars?"

You gotta know which means you got to know all the little steps underneath. Find people who will teach you and look around in the industry and think about who's doing it the way that you like best and see if you can lean more that way. There's lots of different ways to be successful in this industry and I think the most successful planners are the ones who figured out where they best fit and then can aim themselves at that trajectory, also take your CFP and pass your CFP.

Caleb Brown: Absolutely. And Malee, look, I'll say, look, you've already passed the CFP. I mean, like the 65, you can do it. All right. it's not as difficult. So I think you're in a good spot.

Malee Turner: Yeah. I feel confident, I am too.

Caleb Brown: Well, this has been fun, guys. Thanks so much again for coming on the show.

Jessie: Absolutely. Thanks Caleb.

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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.