

# Secrets to Developing **Advisor Partnerships**



**Darin Shebesta,**  
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with Jackson, Roskelley  
Wealth Advisors



**Carina Burtell**  
Financial Advisor with  
Edward Jones



**Kimberly Jetton,**  
**MNM, CFRE**  
Planned Giving Advisor



**Andy Ragone, CGPP**  
Crescendo Interactive

# Advisor Partnership Teams

*Who's on the list?*



# Why Partner with Advisors?

*Who benefits?*



# Why Educate **Advisors?**

*Wait... Don't they know this stuff?*



# Advisor **Recruitment**

*Where do I find them?*

*When I do find them,  
then what happens?*



# Your Advisor **Team**

*Who Makes the Cut?*



# Working With **Advisors**

*Expectations, meetings,  
training and creating loyalty*





# Why Advisors should **follow-up?**

*You want them to do what?*





# Appreciating Your **Advisors**

*Showing the love is never  
a bad thing*



# Thank You



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