

SEQUOIA SYSTEM  
INTERNATIONAL

## Professional Development Programs

### *Testimonials*

### Sales Manager Programs

*"It is rare to find a training program this valuable! Thanks for making us a stronger, more effective wholesaling force!"* Regional Sales Manager, Mutual Funds

*"Once again outstanding! The leader in wholesaler training!"* Sales Manager, Mutual Funds

*"I want to compliment the entire Sequoia organization! We value our partnership with you. We are a stronger sales force thanks to you!"* Senior Vice President, Annuity Sales

*"Sequoia has been an integral part of our firm's success. Every one of our external and internal wholesalers has been through your program. Our results have been greatly enhanced by the Sequoia programs and for that I am eternally grateful."* Managing Director, Mutual Funds

### Core: 80/20 Wholesaling

*"I would recommend this program to anyone! The presentation preparation and the 'elevator speech' were real eye openers to me!"* Regional Sales Director, Variable Annuities

*"Our wholesaler of the year generated a 100% increase in sales and attributed it to your program! I appreciate the value you bring to my sales organization and I look forward to always working together!"* National Sales Manager, Mutual Funds

*"Facilitator was great! He is personal, knowledgeable and has a good command of the subject matter."* Account Manager, Variable Annuities

*"This course provides the infrastructure to build a successful wholesaling franchise. Thank you!"* Wholesaler, Variable Annuities

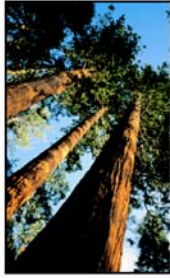
*"Awesome program! I now understand how to better organize my territory!"* Wholesaler, Variable Annuities

*"Very good, motivating, experienced open-minded facilitator. Thank you!"* Wholesaler, Mutual Funds

*"Great insights into wholesaling. Brought experience to the table. A wealth of knowledge!"* Wholesaler, Variable Annuities

*"Gave real valid examples on how to use the information taught in the classroom. Very knowledgeable and experienced."* Wholesaler, Mutual Funds





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### Top Gun: Advanced Presentation Skills

*I now know that my presentations will be different from my competition. I now have a compelling story to tell. Thank you!*

Wholesaler, Variable Annuities

*I will incorporate the "so what" test and "call to action" with every presentation. Thanks for the great ideas!*

Wholesaler, Variable Annuities

*This is the best program I have attended, bar none!*

Wholesaler, Variable Annuities

*I will apply all the strategies we were taught in the program to push the envelope and be different!*

Wholesaler, Variable Annuities

*Excellent facilitator! He was awesome and shared valuable ideas. The time flew by and left me wanting more!*

Wholesaler, Mutual Funds

*This will definitely take me to the next level!*

Wholesaler, Mutual Funds

### FastTrac: Advanced Interview Skills

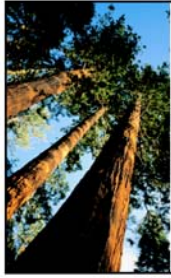
*I just completed the FastTrac Program. My first phone call to an advisor was the best I have ever had! The rapport, the connection, the conversation --- it was all there! Throughout my career I have attended seminars, training sessions, breakout sessions, etc. I always leave with a new idea or approach - with every intention of using it - and that intention lingers on to a day and that day becomes a week, then a month and so forth! **BUT** today I used what I learned in the FastTrac training, immediately applied it and it made a difference. My experience with my advisor this afternoon has empowered me to take my approach to the next level and maintain that upward stream. I'm so jazzed!*

Wholesaler, Variable Annuities

*My biggest take away was the higher level of professionalism attained and the ability to stand out from our competition by being scripted. The logical flow and the impact of the questions we were taught gave me a markedly different reaction from my advisors. I've heard repeatedly comments like "that's a good question, let me think about that" and "yes, I would consider your value proposition going forward". As well, it has gotten me away from an immediate discussion of features and brought my consultative strengths as a wholesaler to the forefront. Thanks for your coaching, your insights into our world, and the obvious thought you put into FastTrac.*

Wholesaler, Variable Annuities





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## Professional Development Programs *Testimonials*

### Sales Desk Manager

*“Excellent program for sales desk managers. Best I have ever had! Interaction was great!”*

Sales Desk Manager, Variable Annuities

*This is the best program I have attended! I can utilize so much right away!*

Sales Desk Manager, Variable Annuities

*This program provided great direction along with the tools I need to coach my team.*

Sales Desk Manager, Mutual Funds

Excellent facilitator! The program is very interactive with practical tools to take back to the office and implement. Thank you!

Sales Desk Manager, Variable Annuities

I've attended many training programs. None have been this helpful. None provided real life takeaways!

Sales Desk Manager, Mutual Funds

### Core: 80/20 Internal Wholesaling

*Great program! It provided useful information that we can use to improve our business going forward.*

Inside Wholesaler, Mutual Funds

*The program was very interactive and easy to understand!*

Inside Wholesaler, Mutual Funds

*Thank you for helping put a roof over my head and giving me the confidence I now have!*

Inside Wholesaler, Mutual Funds

*This was so helpful! I can't wait to implement some of the techniques within my territory!*

Inside Wholesaler, Mutual Funds

*Our facilitator has been there, done that! The program was very engaging and informative!*

Inside Wholesaler, Mutual Funds

