

## Merrill Lynch in partnership with Ivy Exec presents: The Financial Advisors Career Track - Exploring New Opportunities for Women

### In This Issue

[Invitation to Event  
The FA Career Track  
Training at Merrill Lynch](#)



limitless potential  
**[ MERRILL LYNCH ]**  
growth and momentum  
inspiring colleagues  
[ml.com/careers](http://ml.com/careers)

### Define Your Own Success at Merrill Lynch

"One of the advantages of this career is that you have unlimited upside potential. There's no person or structure that's going to limit you to how much you make or how successful you can be. You have complete control over it yourself."

- Marci Behman  
Merrill Lynch  
Financial Advisor

"One of the very, very good advantages is that you can have potentially unlimited earnings. And they give you the room, give you the platform, give you all the tools."

- Jenni Wang  
Merrill Lynch  
Financial Advisor

### What People are Saying About Merrill Lynch's Training:

"I, since coming here, have become a Certified Financial Planner. The firm gave me the resources and the training to acquire different designations that have allowed me to service a larger pool of clients"

- Jennifer Williams,  
Merrill Lynch  
Financial Advisor

"People joke, but Merrill Lynch has trained more than half the financial advisors out there in the field. So a lot of people, including myself, see the training here as being the best."

- Nancy Matta,  
Merrill Lynch  
Financial Advisor

### What is TOTAL MERRILL?



Total Merrill is our expression of wealth management. It captures in a single phrase what our very best Financial Advisors do every day - integrate guidance with our unsurpassed range of services to provide clients with a lifetime of solutions based on their total financial picture. Solutions that go well beyond investments.

In addition to the competitive advantage of Total Merrill<sup>SM</sup>, Merrill Lynch provides all the resources to achieve your most ambitious professional goals. Resources include training and professional development, support from our product specialists, the latest technology, world-class research, and personalized marketing tools.

### Did You Know?

Women off-ramp for **2.2 years**, on average.

However, these relatively short career interruptions have heavy financial penalties.

On average, women lose **18%** of their earning power when they off-ramp. In the banking / finance sector, women's earning power dips 28% when they take time out.

Women lose a staggering **37%** of their earning power when they spend three or more years out of the workforce.

- "Off-Ramps and On-Ramps: Keeping Talented Women on the Road to Success" by Sylvia Ann Hewlett

Hello,

Merrill Lynch in partnership with Ivy Exec will be co-hosting a series of exclusive career events. The events will focus on professionals who are looking to re-enter the workforce or are thinking about switching into a career where they will have more independence and control over their schedule. In addition, all of the events will feature an Ivy Exec presentation that will focus on the Financial Advisor Career Track from a woman's perspective. Both men and women are invited and encouraged to attend. The invitation is below, so RSVP before it's too late!

Best Regards,  
Elena Bajic

### Invitation: Merrill Lynch Recruiting Events

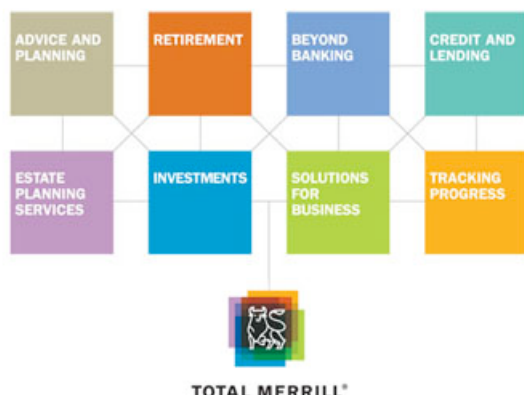
Merrill Lynch and Ivy Exec are pleased to co-host a series of re-entry focused Career Events. Please join us to learn how Merrill Lynch may be your pathway to an exciting and rewarding career as a Financial Advisor!



**May 14** Morristown, NJ  
**May 21** Stamford, CT  
**June 5** Boston, MA  
**June 10** Syracuse, NY  
**June 12** Philadelphia, PA  
**June 18** Hartford /Albany/Saratoga, NY  
**June 25** Long Island NY  
**July 15** Rochester NY  
**September 1** NYC, NY  
**September 3** Princeton NJ

**RSVP:** Registration is required because space is limited. If you haven't done so yet, please register by sending your resume and preferred location to Silvana Carpanelli-Hayes at [silvana@ivyexec.com](mailto:silvana@ivyexec.com).

**Merrill Lynch is an Equal Opportunity Employer.**



### Consider Becoming a Merrill Lynch Financial Advisor!

The Financial Advisor position is highly entrepreneurial and involves extensive client development, prospecting, and consultative selling. Financial Advisors listen to their clients' life goals and objectives and leverage the power of Merrill Lynch to develop financial plans that help them get there.

You participate in training and development throughout your career to continually improve your ability to provide the best advice and service for your clients. Initial training experiences will give you a foundation of financial planning skills and prepare you for the Series 7 General Securities Exam. In addition, Merrill Lynch's Practice Management Development Program provides a highly structured and disciplined 43-month professional development program designed to meet your needs as you build your wealth management practice.

Merrill Lynch offers a competitive base salary as you become licensed and build your business. In addition, quarterly cash performance bonuses, monthly incentive compensation and annual performance bonuses are awarded based on your eligibility to meet all quarterly performance hurdles, monthly calculation of production credits, and length of service benchmarks.

**Merrill Lynch is an Equal Opportunity Employer**



### Training & Accreditation as a Merrill Lynch Financial Advisor

Rewarding careers are made at Merrill Lynch because we define success as a long-term process of learning, discovery and growth. We offer extensive professional development opportunities to help keep our Financial Advisors competitive.

As a new Financial Advisor, you will enroll in a 43 month training program called Practice Management Development Program (PMD). This program has three stages of professional development.

Training focuses on the skills needed to build and grow a successful wealth management practice and is available through:

- "Ready to use" training modules accessible at home and at work via Merrill Lynch University (MLU), our web-based eLearning site
- Coordinators to guide you during your first 30 weeks and local coaches to assist you with the skill development, best practices and consultative sales techniques
- Interactive classroom skills development in Princeton, New Jersey
- External and internal professional designations: Certified Financial Planner (CFP), Certified Investment Management Analyst<sup>®</sup> (CIMA<sup>®</sup>), Chartered Advisor in Philanthropy<sup>®</sup> (CAP<sup>TM</sup>), Chartered Financial Analyst (CFA), Chartered Financial Consultant (ChFC<sup>®</sup>), Chartered Life Underwriter (CLU<sup>®</sup>), Chartered Retirement Planning Counselor<sup>SM</sup> (CRPC<sup>®</sup>)

For Financial Advisors who are adept at meeting the needs of ultra-high-net-worth clients and hold the appropriate prerequisite certifications/designations, we also offer our Private Wealth Advisor (PWA) and Wealth Management Advisor (WMA) accreditation programs.

**Merrill Lynch is an Equal Opportunity Employer.**



### Re-Entry Workshops and Resources

#### Re-Entry Workshops

**A New Path (Harvard Business School)** - A program initially developed for HBS alumnae who reduced their career commitment to care for family, pursue other interests, or to accommodate a spouse or partner's career, is now open to alumnae of other business schools. The 6-day executive education program is intended to be a tactical jump start to a career search.

**"Back In Business" Program (Tuck Executive Education)** - This program, offered in three modules in Hanover, NH and New York City, will update and refresh the management skills of business professionals who want to reenter the workforce and return to corporate careers.

**Career Comeback (Wharton/UBS)** - Participants will update their business knowledge, develop transition strategies, and network with business leaders. This highly-selective program is offered at no charge to qualified applicants through funding from UBS.

#### Re-Entry Publications

**Back on the Career Track: A Guide for Stay-at-Home Moms Who Want to Return to Work** by Carol Fishman Cohen and Vivian Steir Rabin. Written by two Harvard MBAs who stepped away from high-powered careers to raise their children, this book is an easy-to-understand return to work guide.

**Work + Life Fit: Finding the Fit That's Right for You** by Cali Williams Yost includes strategies and practical approach on how to establish personal boundaries at work. Whether you're looking for less hours, more flexibility or just more predictability, this book helps people see the possibilities, ask for what they want, and make it work.

**Getting It Right** by Stanford University psychologist Dr. Laraine Zappert draws upon her 20 years of clinical and research experience to address the questions surrounding how working mothers successfully manage life, family, and career. Dr. Zappert has incorporated case studies from hundreds of women professionals in each chapter to create a road map of innovative solutions.

**Ivy Exec** is the premier job site for highly qualified professionals. We are committed to bringing you the very best opportunities available by pre-screening all jobs to ensure they are appropriate for the caliber of our candidates.

Ivy Exec promotes work-life balance - by posting full-time, flexible, and re-entry positions, Ivy Exec provides professional with the tools they need to make informed career choices.