

Practice Development Series

Module 8: Fine Tuning / Activity 4 – Financial Advisor Book Club

Aligned with the PFA™ Designation Program

Activity 8.4, Section 2 Financial Advisor Book Club

Instructions: Complete the activities below about a book that you read recently that has had a positive impact on the way you approach your financial advisory practice.

Please share your answers so that your peers may benefit from the wisdom offered in your book (podcast, movie, presentation) choice.



Activities

Share the name and author of a book that you read recently that has had a positive impact on the way you approach your financial advisory practice. This could be a book about anything: philosophy, religion, sales, and other professional development areas. If reading isn't 'your thing', you could instead reflect on an inspirational podcast, audio book, movie, or presentation. Please provide a short description of the book, then answer the following questions:

- What changes did you make to your financial advisory practice as a result of reading the book?
- In what way did the book change your outlook on your career as a financial advisor?

