Insights from a recent graduate:

The graduate program at inSOURCE Financial Advisors has been valuable to me. I plan to stay with inSOURCE as a financial professional. Thanks to the program's comprehensive training, I was able to build a strong foundation in financial planning and develop key skills that set me up for success. The support from mentors and the real-world client experiences made all the difference. This program was a game-changer for my career.

-Josh Mikus



OUR MISSION Who We Are. What We Do.

We strive to give our clients the best financial outcomes, transparent costs, and total confidence about their financial planning. We do this through independent, skilled professional advice from teams with specialized knowledge in all areas of financial planning.

OUR VISION

What We Aspire To.

To be the most trusted financial advisors, offering the right advice at the right time to clients whose assets we treat as our own.

OUR VALUES How We Do It.

- 1. Commitment: We hire and partner with the highest quality in the financial sector.
- 2. Compassion: We work tirelessly to protect the dignity of all.
- 3. Equality: We support diversity and never judge.
- 4. Supportive: We strive to work with you, no matter what.
- 5. Independent: We find the most suitable options without fear or favor.
- 6. Honest: We are transparent about charges and knowledge.

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EMPOWERING THE NEXT GENERATION OF Financial Advisors



Our Graduate Program is a two-year journey that provides in-depth training, advanced technical skills, and realworld client experience. Through mentorship and hands-on learning, participants will gain industry insight in financial planning, investment strategies, and client management. By the program's end, graduates will be well-prepared to launch successful careers as financial advisors.

Here is a timeline outlining the two-year program:



During the next six months, students receive in-depth foundational training in finance, investments, and client relationship management. This phase covers comprehensive financial planning, investment vehicles, risk management, retirement planning, and communication skills, ensuring a thorough understanding of core financial advisory concepts and practices.

Advanced Technical Training & Specialization

The second year begins with a six-month period of advanced technical training and specialization. Students deepen their knowledge in areas such as investment analysis, tax optimization, advanced retirement and estate planning, and regulatory compliance. They also choose a specialization, such as retirement planning, estate management, or corporate finance, allowing them to develop focused skills.

Introduction to Financial Advisory

In the first month, students are introduced to the financial advisory profession, the company's culture, and program expectations. This includes a welcome session, meetings with senior advisors and mentors, and an overview of financial advisory roles and ethical standards, setting the foundation for their journey ahead.

Practical Application & Intial Client Engagement

The final five months of the first year focus on practical application and initial client engagement. Students shadow experienced advisors, assist in preparing financial plans, and participate in case studies and simulations. Regular feedback from mentors and early-stage client interactions help students apply their foundational knowledge in realworld scenarios.

Participants in the program will be required to register with the following companies to offer products and services: Ameritas Investment Company, LLC (AIC), Member FINRA/SIPC - securities and investments and Ameritas Advisory Services, LLC (AAS) - investment advisory services. AIC and AAS are not affiliated with inSOURCE Financial Advisors.

Start your journey toward becoming a successful financial advisor today by applying to our comprehensive two-year Graduate Program!

Call us at 402.827.4467 or visit our website at insourcecentral.com

Capstone Project & Assessment

In the final six months, students work on a comprehensive capstone project that involves creating and presenting a detailed financial plan for a complex, hypothetical client scenario. They are assessed on technical accuracy, clientcentric approaches, and presentation skills. The program concludes with individual assessments, feedback sessions, a focus on professional development, and a graduation ceremony where students receive completion certificates, marking their readiness for full-time roles as financial advisors.