**SUMMER ASSOCIATE ONBOARDING AGENDA**

**ORIENTATION/SCHEDULE for Intern 1 and Intern 2**

**Monday - May 22, 2017**

9:00 – 9:30AM Welcome/Computer Orientation (including External IT)/Office Tour/Introduction to Workspace (FJY Staff)

9:30 – 10:00AM Introduction to FJY Vision and Strategy (CEO)

10:00 – 11:00AM Junxure Orientation (Ops Person)

11:00 – 11:15PM Break

11:15 – 12:00PM Junxure Videos

12:00 – 2:00PM Lunch with Team

2:00 – 3:00PM I-9 employment verification, W-4s, Payroll forms, HR Orientation, etc. (Office Manager)

3:00 – 3:30PM General Expectations (Office Manager)

3:30 – 3:45PM Break

3:45 – 4:45PM Introduction of Summer Projects, Expectations Agreements (Lead Advisor)

**Tuesday - May 23, 2017**

9:00 – 10:30AM Junxure Training and Practice (hands on)

10:30 – 11:00AM Unscheduled

11:00 – 12:00PM Client Process & Service Tiers (Ops Person)

12:00 – 1:00PM Unscheduled

1:00 – 2:00PM Worldox Orientation

2:00 – 3:00PM Worldox Filing Training and Practice (hands on)

3:00 – 3:30PM Unscheduled

3:30 – 4:30PM Custodian Website & Forms, Overnight Log, Worldox Reservations (Ops Person)

**Wednesday - May 24, 2017**

9:00 – 9:30AM Telephone/Admin Training

10:00 – 11:00AM Team Meeting

11:00 – 12:30PM Internal Meeting, Operations (include BOC overview), Compliance (Office Manager)

12:30 – 2:00PM Lunch/Unscheduled

2:00 – 3:30PM Discussion and Q&A of Summer Projects, Expectations (Lead Advisor)

**Thursday - May 25, 2017**

9:30 – 10:30AM Discussion of Financial Planning Committee (FP Chair)

10:30 – 12:00PM Financial Planning Committee Meeting

12:00 – 2:00PM Lunch and Check In With mentors

2:00 – 3:30PM Worldox/Junxure Practice (refresher)

3:30-4:00PM Unscheduled

4:00 – 5:00PM Introduction to Client Meeting Preparation (Lead Advisor)

**Friday - May 26, 2017**

10:00-11:00AM Intro to Retirement Plan Services

11:00 – 11:30AM Administrative Training (refresher)

11:30 – 12:30PM MoneyGuide Pro (Lead Advisor)

12:30 – 2:00PM Lunch/Unscheduled

2:00 – 4:30PM Capital Overview/Discussion of Investment Committee (CIO)

**May 29, 2017 Office Closed for Memorial Day**

**Tuesday - May 30, 2017**

9:00 – 10:00AM Unscheduled

10:00 – 11:00AM AdvisorView Refresher, Custodian Training Refresher (Ops Person)

11:00 – 5:30PM Unscheduled/Summer Projects/Worldox/Junxure Practice

**May 31 – June 2, 2017**

All Days Practice Worldox Image/Junxure/AdvisorView/Rebalancer (mentors show real client examples)

**May 31, 2017 FJY Happy Hour (Location TBD) 4:30PM**

**June 5, 2017**

Intern 1 to shadow Mentor 1

Intern 2 to shadow Mentor 2

**June 6-7, 2017**

Intern 1 to shadow Mentor 2

Intern 2 to shadow Mentor 1

**June 8-9, 2017**

Intern 1 to shadow Mentor 1

Intern 2 to shadow Mentor 2

**June 12-13, 2017**

Intern 1 to support Lead Advisor 1

Intern 2 to support Lead Advisor 2

**June 14-16, 2017**

Intern 1 to support Lead Advisor 2

Intern 2 to support Lead Advisor 1

**June 19-23, 2017**

Internal Meeting Week/Summer Projects

**June 26 – 30, 2017**

Intern 1 and Intern 2 to support Lead Advisor 1 clients (with associates “holding hands”)

**July 4, 2017 FJY Office Closed – July 4th Holiday**

**July 3 – 7, 2017**

Intern 1 to support Lead Advisor 2 clients (with associates “holding hands”)

Intern 2 to support Lead Advisor 1 clients (with associates “holding hands”)

**July 10 – 14, 2017**

Intern 1 to support Lead Advisor 1 clients (with associates “holding hands”)

Intern 2 to support Lead Advisor 2 clients (with associates “holding hands”)

**July 17-21, 2017**

Internal Meeting Week/Summer Projects

**July 24 – July 28, 2017**

Intern 1 is primary support for Lead Advisor 2 clients

Intern 2 is primary support for Lead Advisor 1 clients

**July 31-August1, 2017**

Summer Project Week

**August 7-11, 2017**

Intern 1 is primary support for Lead Advisor 1 clients

Intern 2 is primary support for Lead Advisor 2 clients