



AREAS OF FOCUS

INFINEX TRAINING & DEVELOPMENT

At Infinex, we understand that financial professionals need ongoing education to deliver the highest level of service to their clients. We also realize that learners must be able to access content when and how it's needed. Therefore, we have a variety of delivery channels available to you and your entire team.

Infinex Training and Development is committed to creating and presenting timely courses, quick guides, workbooks, and references that truly make an impact on the overall success of your investment program.

Investment and insurance products and services are offered through INFINEX INVESTMENTS, INC. Member FINRA/SIPC. V.04.23.

- ✓ Our Orientation Experience
- ✓ Infinex University & My University
- ✓ Live Webinars
- ✓ C.A.R.E. Programs: Lead Generation Designed for Your Financial Institution
- ✓ Contact Center Modules

[CONTACT TRAINING](#)

A COMPREHENSIVE APPROACH

Infinex is dedicated to helping all the people that impact your individual success and the overall growth of your investment program. We are available to deliver personalized training to a variety of audiences including, but not limited to:

- Program Managers & Financial Professionals
- Associate Financial Professionals
- Sales Assistants, RBEs, & LBEs
- New Bank or Credit Union Employees
- Retail Staff (Senior Management, Branch Managers, Lenders, Call Center Staff, Team Leaders, Customer Service Representatives, etc.)



INFINEX ORIENTATION

Orientation for new financial professionals, program managers, and back office personnel starts as soon as the hiring process is complete:

- Once Infinet system credentials are issued, you will have access to a virtual Learning Path in My University. There is no need to wait to write business as the Learning Path delivers all the information you need to learn our technology and get started.
- You will have immediate access to Infinex Training and your Client Services team. They are proactive with their outreach and are available to answer any questions that arise.
- Infinex also delivers a monthly orientation to allow you to ask additional questions, to meet the team dedicated to your success, and to learn more about the resources available to you.
- As you become familiar with Infinet, you will receive additional training resources and Advanced Learning Paths to make ongoing education easy and accessible on your schedule.

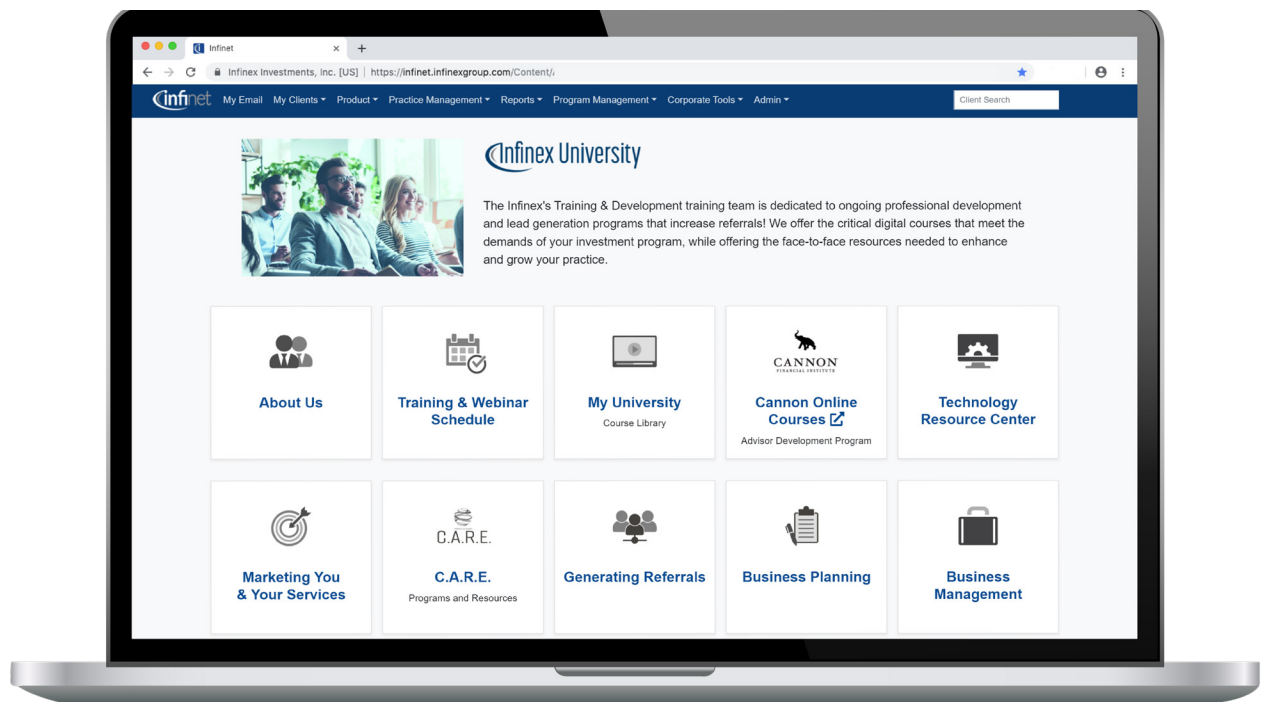


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Amie joined the Infinex family in 2004 and previously held several positions in retail banking including managing a call center, lending, and Branch Manager.

Amie was also a participant in the C.A.R.E. programs she now delivers. (See the following pages for details!) She uses her retail banking background to help Infinex representatives cultivate more opportunities. While delivering various workshops and webinars, she draws on her past experiences to better connect with her participants. Using Infinex's consultative approach, she is also able to refer program managers, financial professionals, and support staff to valuable Infinex resources that can enhance their practice.



INFINEX UNIVERSITY & MY UNIVERSITY

Infinex understands the time constraints placed on financial professionals, LBEs, and assistants in the bank and credit union channel. You need quick and easy access to helpful training materials that make an impact and a virtual education system tailored to your specific role.

- **Infinex University** provides all Infinet users with best practice guides, worksheets, quick tips, product provider value-add material, and other resources designed to develop a successful investment practice.
- **My University** offers on-demand, mobile training classes that are on average, only 20 minutes long. Find classes on everything from business planning and marketing, to Infinet tips and Infinex Wealth Solutions.
- **Cannon Online Courses** are also available through Infinex University. For over fifty years Cannon has developed, designed, and executed performance improvement programs. These programs support financial institutions, their staff, and the clients and communities they serve. They focus on developing technical knowledge, practice management, and client conversational skills.



LIVE WEBINARS

In addition to on-demand training through My University, Infinex offers numerous live monthly webinars. These webinars are hosted by Infinex department leads and review technology releases, timely ideas to generate business, helpful product news, productivity skills, and more. Our webinars are tailored to your needs and topics are determined by feedback directly from the field.



Lead Generation Designed for Your Financial Institution

Infinex's proprietary C.A.R.E. programs help our institutions optimize branch referrals and build relationships. Referrals will always be an important source of new business for financial professionals, but they don't just happen on their own. At Infinex, we strongly believe that consistent referrals begin with financial education for clients, members, and staff. Financial education is a must at any age and even bank and credit union staff need an expert to teach them pertinent financial information.

The name of these lead generation programs reflects our education philosophy. Strong referrals occur when **C**onfidence is built through financial education and there is an **A**bility to make introductions using the right words. This leads to a **R**ecognition of needs that shows clients that you CARE. The result is **E**nhancing important relationships. When your staff is prepared with the right knowledge, skills, and support, the referrals you want *will* follow.

Infinex has delivered our C.A.R.E. programs since 2003 to over 200,000 participants. Our approach is not "one and done." Instead, we continue to provide new and valuable resources that will help your program and team continue to thrive.

Types of C.A.R.E. Programs

- **C.A.R.E. Master Classes:** Our Master Classes deliver the knowledge and skills to help participants make referrals and educate their clients and members. The first part of the Master Class focuses on developing an understanding of words and how they affect customer conversations. This second part of the Master Class focuses on how to handle client responses, including objections. These classes are typically delivered by members of Infinex's training team, but a "train-the-trainer" option is available.
- **Branch Training Modules:** These modules have instructions, handouts, and talking points ready to go. Infinex representatives can easily host their own short meetings to educate staff on timely topics. (Either face-to-face or virtually.) These modules help to keep the investment program and its services top of mind.
- **Referral Tip Flyers:** Our monthly C.A.R.E. email and flyer are designed with branch staff in mind. They further promote important educational topics and the investment program. They also include relevant ideas to help recipients identify opportunities for introductions.
- **Contact Center Modules:** Our customized Call Center Training program is designed to assist any member of the financial institution's staff that receives in-bound calls. We focus on learning how to transition a transaction call to a conversation that will result in a referral and/or a visit into the branch. Make every call a lead generation opportunity!
- **Additional Programs & Consulting:** We also provide customized classes and consultative support to help financial institutions implement successful referral programs and processes. Contact us today for a list of available topics. We are always expanding our offerings!