

ONE⁰

TIMELINE ADVISOR TRACK

FINANCIAL PLANNING ASSOCIATE

Focus: Support
Timeline: 0-3 Years
Education Track: CFP, CKA
Comp: Base Salary + Bonus
Skill Development: Competency
(Technical)



ASSOCIATE ADVISOR

Focus: Advisor Development
Timeline: 3-6 Years
Education Track: CFP, CKA
Comp: Base Salary + Bonus
Skill Development:
Relationship Building

LEAD ADVISOR

Focus: Advising
Timeline: 6+ Years
Comp: Base Salary + Bonus
Skill Development:
Business Development



SENIOR ADVISOR

Focus: Relationships
Timeline: 10+ years
Comp: Base Salary + Bonus
Skill Development:
Management



PARTNER

Focus: Management
Timeline: *By invitation
Comp: Base Salary + Bonus + Firm
equity
Skill Development:
Firm growth