

# ELEVATE

## YOUR CHOICES

### We're Invested in Your Success!

Financial Advocates helps financial advisors discover their desired path to independence. Our expert service in regulatory compliance, back-office administration, business development, marketing, and technology can simplify obstacles, and make doing business easier.

SHAPE YOUR FUTURE

EXPERIENCE GREATER  
CHOICE

ELEVATE YOUR CLIENT  
EXPERIENCE

BUILD A LEGACY

**Refine, Strengthen and Grow Your Practice**

**Our custom advisor solutions can support you in a multitude of areas.**

### **BUSINESS DEVELOPMENT**

Stay competitive with ongoing practice management and support.

### **CLIENT CARE**

Increase processing efficiency and deliver an enhanced client experience.

### **COMPLIANCE**

Be compliant and in-the-know with experienced regulatory support and guidance.

### **MARKETING**

Increase brand awareness, stay connected and expand your reach with professional advisor marketing.

**HYBRID/PURE RIA REGULATORY  
SUPPORT**

**INVESTMENT MANAGEMENT /  
FINANCIAL PLANNING**

Ease the burden with a silent strategic partner.

Increase the value of your service but not your hours with a comprehensive, sound approach.

## TECHNOLOGY

Innovate your practice with leading technology.

## TRANSITION SERVICES

Transition to greater independence with a custom-tailored plan.

# Shape Your Future

Whether you want to transition to an Independent Broker-Dealer, eliminate your reliance on your institution's home office as a Hybrid RIA, or break the mold as a Pure RIA, we can help you bridge the divide.

Explore our different transition programs.

Become an Entrepreneur

Pursue More Opportunities as a Hybrid RIA

Break the Mold as a Pure RIA

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*“Financial Advocates’ technology group has helped me make decisions on complementary software that I can use to become more organized, have a greater capacity for growth, and bring on more clients.”*



Steve Fuller Financial Strategies

## How to Grow Now

A growth strategy involves more than simply envisioning long-term success. It requires a plan that can be easily implemented no matter where

**you are on the bridge towards increased independence.**

**In this whitepaper, we review six growth strategies that Financial Advisors, like yourself, need to increase their revenue and stay proactive about their business in 2019.**

**Free Download**

 **Financial Advocates™**  
Bridging Alliances for Advisors

**How to Grow Now:  
Growth Strategies for  
Financial Advisors**



**Create a Top Dollar Practice**

**We help advisors strategize for the next adventure, which may be a leisurely retirement or a new venture. No matter what your vision of the future, if you want to receive top dollar for your practice, it's best to start planning now.**

**Is your practice "move-in" ready?**

**Schedule a Free Business Valuation**

## **Together We Achieve More**

**Our strength lies in the connection we share between our vast community of independent financial advisors and the dedicated staff who continuously strive for mutual, ongoing success.**

**View Our Advisor Network**

**Meet Our Dedicated Team**

**Learn About Our Community**

# Insight

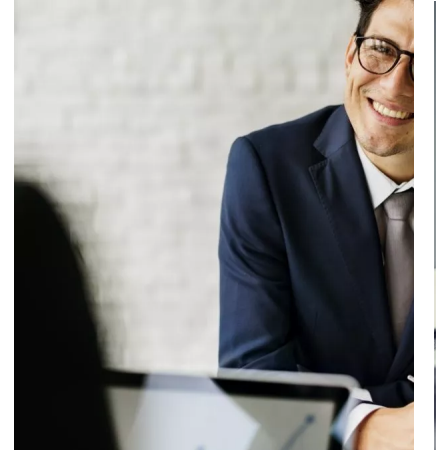
Look to us for valuable insights into the latest industry news, trends, best practices, technology updates, research and more!



**Charity Spotlight: Fors Financial / "Hog Wild" for Olympic Medical Center Foundation**



**Financial Advocates Named as a Finalist for Two WealthManagement.com 2019 Industry Awards**



**How to Create Compelling Prospecting Offers**

## Looking to grow or expand your financial practice?

We support an expansive network of independent financial advisors across the nation. If you are thinking about increasing your independence and opportunities for success, let's talk.

**Schedule Now**





## Bridging Alliances for Advisors

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