

GOSS ADVISORS

NAVIGATING INDEPENDENCE TOGETHER

ABOUT US

FT
FINANCIAL
TIMES

Top
**Financial
Advisers**
2018

FT 300 Ranking June 2018

FT
FINANCIAL
TIMES

Top
**Financial
Advisers**
2017

FT 300 Ranking June 2017



At Goss Advisors, we do things a little differently. We are building a partnership of established advisors to make independence easier, more fun, and ultimately more successful. We don't teach advisors how to be successful, we partner with those who already are.

Our partnership was founded to give each of our individual practices a better way to serve our clients and to manage time and expenses more effectively than we could on our own. With 85+ advisors, and servicing \$5.3 billion in Brokerage and Advisory assets*, we take pride in a firm built by advisors, for advisors.

If you're like us, you are here because you have a deep appreciation for the advisor-client relationship and years of experience putting their interests first. Now you want the opportunity to own your hard-earned book of business. We know firsthand that the unknowns associated with building your own independent practice are daunting – we've been there.

OUR COMMUNITY

Advisors in the partnership aren't asked to adopt our Client First Philosophy, they are welcomed because they have one of their own.

We are curating a partnership of top practitioners in our field who are entrepreneurs, thought leaders, and problem solvers who believe that sharing resources, experiences, and best practices across a network of like-minded professionals contributes to increased success. Together, we are shaping the future of our industry.

Not every advisor that wants to affiliate with Goss Advisors gets to do so. We also have a very simple 'no jerk' policy that means just what it says.



GOING INDEPENDENT

The feeling of true independence is indescribable and can only be fully appreciated once you are here. Pride of ownership, autonomy, and the ability to provide objective recommendations to clients are resounding reasons our advisors find independence so rewarding. But beyond the emotion of independence, there are concrete and quantifiable benefits we collectively enjoy.

Independence is more than a feeling. Which partnership benefits are right for your practice?

PROGRAMS

Some of us thrive in a branch style environment while others prefer autonomy and structured opportunities for collaboration. Our programs provide varying levels of support and the flexibility to structure your practice as you see fit.

We assist you with the complexities of running your business, freeing you up to focus on what you do best – caring for your clients.



GOSS DIFFERENCE

Building Something Bigger Than Ourselves

Partnering with Goss Advisors is an active decision to join a movement of successful advisors in relentless pursuit of an improved client experience. Our advisors' ideas, contributions, and feedback directly support our collective success and shape the future of our partnership.

A Firm Built by Advisors Just Like You

Our firm was built to make advisors more profitable, not to profit from advisors. Our structure is designed to share costs, infrastructure, and resources across a network of professional advisors, allowing us to invest more time and resources into our clients.

Direct Access to Experienced Leadership

As our partner, you will have direct access to a leadership team with more than 60 years of combined industry experience and knowledgeable, local support to help manage the complexities of independence. Our advisors' ideas, contributions, and feedback directly support our collective success and shape the future of our partnership.

ADVISOR RESOURCES

While we can't promise you that switching to independence will be easy, you can rest assured that you'll have unparalleled support from our experienced leadership team and the collaboration of like-minded advisors working together to solve business challenges.

From guiding you through a discreet and meticulously organized transition, to providing technology and investment choices that allow you to better serve your clients, we've got you covered.

- Investment & Portfolio Management
- Practice Management
- Compliance
- IT Support

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Financial Times Top 300 Advisers awards for 2017 and 2018, displayed on multiple pages is based upon assets under management as of July 1st of each corresponding year. Award also based on: asset growth, compliance record, years in existence, credentials and online accessibility.

* Combined Advisory and Brokerage Assets as of April 30, 2019.

