

A Path for Growth

We're making financial services easier,
together.



Who We Are

ChangePath is committed to your success. We provide quality investment solutions, innovative technology, practice management efficiencies, and marketing resources to advisers who operate their business with the highest integrity. Our success is your success, and ChangePath is a dedicated partner on this journey.

Who We Work With



IAR

As a Registered Investment Adviser, we add value while reducing your operational costs, streamlining your back-office, providing compliance oversight, and offering marketing solutions so you can spend your time where it matters most – with your clients.



Subadviser

ChangePath's open integration enables us to work with you at the firm level. Keep your business running as usual – let us expand your investment offering, help maximize efficiencies within your operations, and offer a solution that offloads your back office to us.



Solicitors

If you already have your own RIA but you feel like you've reached a ceiling you can't break through, we can help. Entering into a solicitor relationship puts more responsibility on ChangePath so you can get back to building client relationships.

BAM Advisory Group

"I would only encourage fellow advisors to use ChangePath if they want to make their practice simpler, make more money, and have more time doing things they love." David A.

Watch Full Story 

**Call 888.798.2360 and learn more about the
ChangePath solution.**

Full Name *

Questions or Comments *



Email *

Phone *

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