What are you looking for from your next firm?

Janney's Position on the Protocol

We work hard to deliver a culture at Janney that allows advisors to manage their business how they choose and where they feel they can keep their clients' best interests first and manage their business accordingly. As a result, we have high advisor satisfaction and retention and, in turn, high client satisfaction. Investors

need consistent, relevant financial advice from trusted sources more than ever. Janney is part of Protocol because it ultimately helps to protect the client by maintaining a consistent delivery of advice and service to investors by their advisor. By leaving Protocol, firms put their clients in a position of having to pause, or end, getting advice from an advisor with whom they've built a trusted relationship over years.

Leaders from Janney's Private Client Group discuss what you can do now as you consider moving to a new firm.

Wherever you may be in your decision-making process, now may be a good time to hear from inside experts on what makes for a successful transition. Play the podcast below to listen as Jerry Lombard and Jeff Smith discuss the steps you can take now.

INVESTMENT PERSPECTIVES
Protocol or Not, 3 Steps You Can Take Now
30 00:00:00 / 00:25:46 30

"I came to Janney because I wanted a firm where my clients come first...I wanted support and freedom to develop my practice in the direction that best serves my clients."

Sheila Shaffer, Executive Vice President, formerly with Morgan Stanley

Contact Us

Transition Process

Once you make the decision to join Janney, we assign you an experienced transition team to start moving your business.

THE TRANSITION TEAM > (/TRANSITION)

Janney Technology

Janney has created an integrated technology platform to help you deliver extraordinary advice and service to your clients.

EXPLORE THE TECHNOLOGY > (/TECHNOLOGY)

Practice Management

Our culture ensures responsive service from home office personnel while encouraging local decision making.

JANNEY VALUES ACCESS & SUPPORT > (/PRACTICE-MANAGEMENT)

Firm Culture

How Firm Culture Impacts Advisor Breakaway Decisions

READ MORE > (https://advisorhub.com/resources/how-firm-culture-impacts-advisor-breakaway-decisions/)

Investment Strategy

READ MORE > (https://janneyinvestmentstrategy.blogspot.com/)

Recruiting News

Janney Adds 19 Financial Advisors in the Second Quarter of 2019

READ MORE > (http://pressreleases.janney.com/2019/07/janney-adds-19-financial-advisors-in.html)