

# Running your business the way you've always wanted to starts here.

## Get: 5 Questions You Need to Ask



## Download The Self-Assessment Now



**10 questions to ask your potential IBD partner**

- 1. How long has your company been in business?**
  - 10 years or more
  - 5-10 years
  - 1-5 years
  - Less than 1 year
- 2. How long has your company been in business?**
  - 10 years or more
  - 5-10 years
  - 1-5 years
  - Less than 1 year
- 3. How long has your company been in business?**
  - 10 years or more
  - 5-10 years
  - 1-5 years
  - Less than 1 year
- 4. How long has your company been in business?**
  - 10 years or more
  - 5-10 years
  - 1-5 years
  - Less than 1 year
- 5. How long has your company been in business?**
  - 10 years or more
  - 5-10 years
  - 1-5 years
  - Less than 1 year
- 6. How long has your company been in business?**
  - 10 years or more
  - 5-10 years
  - 1-5 years
  - Less than 1 year
- 7. How long has your company been in business?**
  - 10 years or more
  - 5-10 years
  - 1-5 years
  - Less than 1 year
- 8. How long has your company been in business?**
  - 10 years or more
  - 5-10 years
  - 1-5 years
  - Less than 1 year
- 9. How long has your company been in business?**
  - 10 years or more
  - 5-10 years
  - 1-5 years
  - Less than 1 year
- 10. How long has your company been in business?**
  - 10 years or more
  - 5-10 years
  - 1-5 years
  - Less than 1 year

**SFA PARTNERS**

**To learn more about your opportunities with us, give us a contact us!**

Phone: (719) 554-4000  
 Toll Free: (800) 447-2444  
 Email: [henrietta@sfaa.com](mailto:henrietta@sfaa.com)

## Tips to Finding the Best IBD Partner

**TOP QUESTIONS TO ASK WHEN CONSIDERING A NEW IBD PARTNER**

The secret to finding a good IBD partner comes down to this: Think about how your clients feel about you.

One Down | Jan 21, 2015

In recent years, a popular theme across the independent financial services industry has been the expressed movement towards broker-dealer consolidation. Unsurprisingly, there has been a fair amount of consolidation activity, but the fact is that nothing about today's landscape is unique. For decades, consolidation – as well as deconsolidation, as mergers fail or sub-groups split off – has always been the reality, and going forward it will continue to be so. It's simply the nature of the business.

In fact, most independent broker-dealers (IBDs) today are on the smaller end of the spectrum, having fewer than 100 advisors and \$10 billion in assets under administration. It's important to note that many of these small to mid-sized firms have intentionally chosen to remain so, not because they are unable to grow or attract new recruits, but rather, they are deeply committed to their business model and feel strongly about the distinct value proposition they offer advisors.

Obviously, there are advisors who will find comfort in the safety and stability of being part of a large, mega-IBD. The same can be said for some investors, who prefer to be associated with a bigger brand name.

**SFA PARTNERS**

**SFA**

**SFA was founded in 2008 by a group of advisors and industry leaders who fully appreciated and saw the need for a Broker that would support the independence of our advisors.**

**The founders wanted to provide a better experience and for others who were passionate about their clients and about their own independence.**

Learn more about SFA and their empowered advisors:



A culture to simply your life.  
Yes, it still exists.

"SFA gives us the freedom and flexibility to let us run our business in a way that helps our clients. They look after us, share great ideas with us and really seem to care about us. In today's world, that's simply special."

*Corey Letson offers securities and certain advisory services through The Strategic Financial Alliance, Inc. (SFA), member FINRA/SPIC. Georgia Wealth Partners is otherwise unaffiliated with SFA.*

Enjoy the kind of **support** that takes you further:



## Enjoy More Freedom and Independence with SFA:

“The many ways we fuel your entrepreneurial spirit is what sets SFA apart. We are in the background, enabling you to utilize your ideas to realize your vision. We give you the foundation to grow. And we treat you as the professional business owner you are.”



### TRANSITION TIP

**Think** through staffing needs for transition and beyond — ask if they offer ongoing HR consulting/staffing assistance.

I would like someone to contact me

Yes, I would like to talk with someone from SFA!

First Name

Last Name

Company Name

Email Address

Phone Number (format is XXX-XXX-XXXX)

Please have SFA Contact Me

I'd like to stay informed. Please continue to send me more information about SFA.

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Phone: (678) 954-4000 // Toll Free: (888) 447-2444 // Email: [teamsfa@thesfa.net](mailto:teamsfa@thesfa.net)