FAMILY WEALTH
SOLUTIONS
Powered by CONCURRENT

# Welcome to Your Journey to Independence

Family Wealth Solutions offers a turnkey path to independence designed for advisors who value culture, collaboration, and close relationships with their clients. As an equity partner, you gain access to an experienced team to help with the transition to the independent model, along with the tools and support to streamline practice management needs.

## Technology

Our firm is powered by Concurrent, one of the largest Registered Investment Advisors (RIAs) in the country. This enables us to provide access to Concurrent's industry-leading technological platform, which offers unique investment opportunities and cutting-edge solutions.

As a multi-custodial RIA, you can manage your client's investments with more flexibility and customization. Through Fidelity Investments and PKS, you can provide the best solutions for your clients, while emphasizing the importance of personalized advice.

## Transition

Our process helps you transition successfully to become an empowered entrepreneur and thrive. While we operate with independence, we also have incredible strength through our strategic financial partners.

## Collaboration

We believe in sharing ideas within our team to ensure clients receive the best service regardless of which advisor they work with. Working with our team, network, and platform allows you to benefit from the experience of others while bringing your own ideas to the table.

## Growth

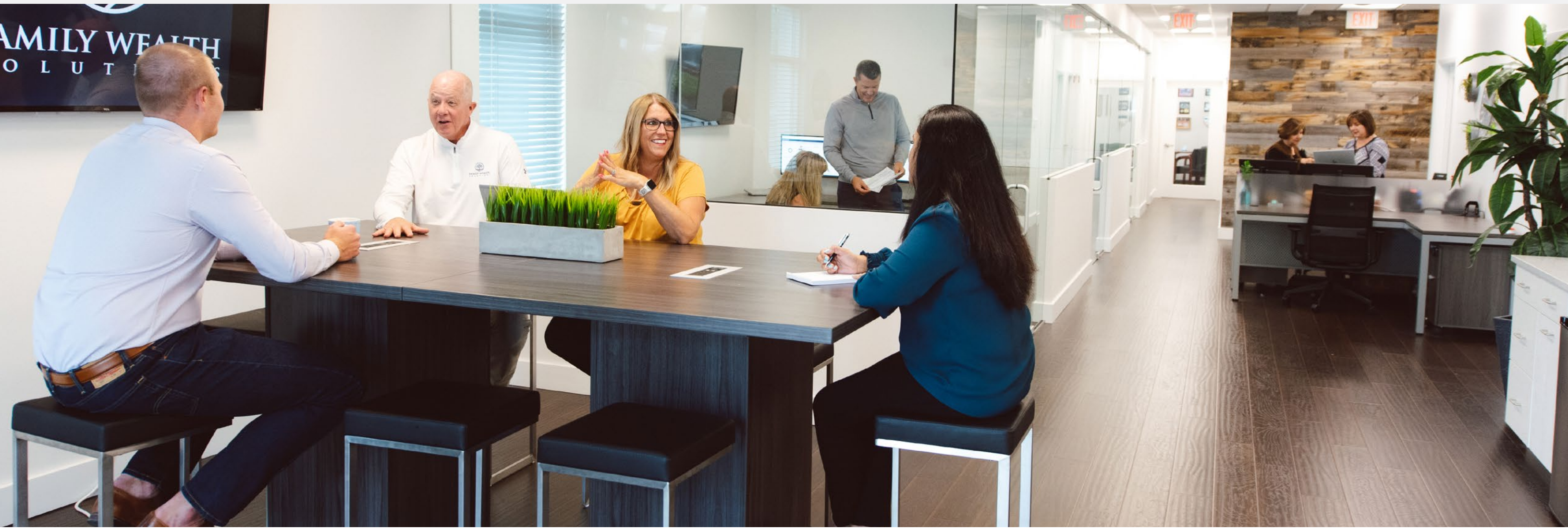
We provide a growth process tailored to financial advisor entrepreneurs. All of our advisors are owners in Family Wealth Solutions, giving you the time and resources to reach more people and make an impact in your community. We provide the office space, tools, and marketing to support what you do best - manage your clients wealth. We streamline your management needs so you can focus on increasing revenue and growing your practice.

## EXCLUSIVE BENEFITS FOR OUR ADVISORS

- **Security of funds** - We have custodial relationships with “best-in-class” Fidelity and Charles Schwab who provide both investment solutions and growth opportunities with their client referral programs. Also, access state-of-the-art software such as Black Diamond and SMArtX that are provided by Concurrent to facilitate our practices.
- **Flexibility** - Serve your clients in the way you think is best, without worrying about conforming to the standards of a larger institution.
- **Infrastructure** - Modern office space, marketing support, experienced support staff, and access to a community of like-minded advisors who offer guidance and support as you navigate the nuances of continuing to build your business.
- **Equity** - You are an equity partner of the firm; you have a stake in the success of Family Wealth Solutions as a whole.
- **Monetization** - An exclusive opportunity to capitalize on an event designed to help you monetize your business in a way that aligns with your long-term objectives. You can take advantage of new revenue streams, tap into new markets, and leverage your existing assets to generate more value for your business.

## “Our collective success lies in the quality and character of our team members.”

We know what it takes to thrive in the independent space, and we know the value of community. Our goal is to help you create sustainable, defensible, and transferable enterprise value and deliver a superior client experience.



## Make Family Wealth Solutions your home.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