

BUSINESS CONSULTING

STAY COMPETITIVE WITH
ONGOING STRATEGIC
SUPPORT



Our Business Consulting Team has extensive industry knowledge of LPL Financial and Financial Advocates' multi-custodial partners. Our consultants provide you access to a variety of resources and keep your best interests in mind. They serve as your primary strategic resource to kick-start your practice and maximize advisory firm potential over the long term.

WHAT TO EXPECT



Ongoing practice management guidance



Influential relationships with LPL Financial and multi-custodial partners



Extensive industry knowledge



Networking and collaboration with vendor partners

OUR SERVICES

- ✓ In-office consultation
- ✓ Pricing/fee structures
- ✓ Client segmentation and servicing
- ✓ Advisor and staff training
- ✓ Succession and contingency planning
- ✓ Advisor recruiting and on-boarding
- ✓ Annual conference
- ✓ Regional meetings and study groups



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