

# THREE ADVANTAGES TO GOING INDEPENDENT

## INVESTORS WITH COMPLEX NEEDS MAY BE BETTER SERVED BY FLEXIBLE OPTIONS

One key area that highlights an independent financial professional's freedom is flexibility. Flexibility means being able to access investments that may be more appropriate to a client's complex, individual needs. Independent financial professionals provide customized solutions that are free from the bounds of proprietary product offerings. This can be an especially attractive feature to high-net worth or affluent clientele. An open-architecture approach sets independent financial professionals apart from the competition. You can focus on your client's bottom line – not the company's.

Independent financial professionals make up one of the fastest growing segments in the financial services industry. If you're curious about breaking free, you may want to consider these advantages that independent financial professionals can offer their clients.

## TRANSPARENT FEE STRUCTURE SPEAKS VOLUMES

Transparency is the currency of confidence, and confidence builds trust. Proactively sharing a firm's fee structure has become part of the new standard for fiduciaries. Regardless of whether you're working on retainer, flat-fee, hourly rate, AUM, or commission, costs and fee structures should be transparent. In today's increasingly competitive environment, focusing on the old maxim, "price is only an issue in the absence of perceived value" has never been more critical.

## ABILITY TO PROVIDE CLIENT-CENTRIC SUPPORT

Maybe it's time to let corporate agendas become a thing of the past. Our platform provides you with the infrastructure, control, and stability to do business your way. We believe our process makes it easier for you to keep your clients where they belong – as your top priority. We do this by providing for all of your onsite needs along with integrated technology solutions that seamlessly combine the broad range of essential business applications that financial professionals often struggle to maintain. With additional advanced technology such as eSignature and compliant client-texting capabilities, you can focus on deepening relationships and growing your business, not on the next company meeting.

A key element in providing client-centric support is for the financial professional to obtain entrepreneurial flexibility and work-life balance. Kestra Private Wealth Services offers paid for turnkey real estate options, including leasing, rent, design, down payments, tenant negotiations, and more. We believe providing the highest level of financial professional support will translate into client satisfaction.



Choosing to go independent is an important decision for any financial professional, with benefits so rewarding that you may wonder what took you so long to decide in the first place. Contact Kestra Private Wealth Services recruiting at **800-508-SOAR** or **advisorrecruiting@kestrafinancial.com** and forecast your future today.