PARTNERING FOR SUCCESS

As a wholesaler, your goal is to build strong relationships with your financial advisor clients so they continue to work with you and your company. To do this, you work tirelessly to make new connections and find new value-adds that you can offer your clients.

We share many of your goals and efforts as a transition specialist for advisors. We are only as successful as the relationships we build with advisors, as well as broker-dealers, custodians and RIAs. For more than 10 years, we have dedicated my time to helping successful, established financial advisors handle various aspects of their business lives, consulting with them on broker-dealer transitions, succession planning, and successor identification.

Together, we can offer your clients great value. By working with a transition specialist you trust with your clients, you communicate that you care about your clients' businesses from a holistic point of view – that they mean more to you than just another sale.

Client Snapshot

- Average annual revenue of $800,000
- Average $100 million AUM
- Average 6-month project engagement
- Broker-dealer and RIA
- Midwest focus and National outreach

Relationships Matter

- Assisted 50+ advisors transition to a new business platform over the past 2 years
- Built strategic relationships with 100+ BDs, custodians and RIAs
- No cost to the Advisor

3 CORE VALUES TO BENEFIT YOUR CLIENTS

CONFIDENTIALITY:

Every conversation we hold with a prospective or existing clients is absolutely confidential. We can also keep my relationship and conversations with you confidential, if you prefer.

NEUTRALITY:

While we work hard to build strong relationships, we never set our own agenda or exhibit preferences with regard to any specific broker-dealer or firm. You won't likely find this at other recruiting firms.

AVAILABILITY:

We strive to be a resource for you as well as your clients. Reach out to me any time you have a question about the industry or if you would like assistance in getting in front of a particular advisor or group.

STAY CONNECTED TO STAY TOP OF MIND

Let's stay in touch to see how we can help each other and our financial advisor clients. The more we learn about one another and the more we call on each other with questions or referrals, the stronger our businesses and our networks will be. So don't hesitate to call me at **612.208.0653** or send me an email at **ahasler@finetoothconsulting.com.** We look forward to partnering with you!

transition specialist
AARON HASLER

FINETOOTH CONSULTING

ahasler@finetoothconsulting.com • www.aaronhasler.com
W: 612-208-0653 M: 612-669-9073