Fully Supported Independence

Here are a few key benefits of joining **Conservant Financial** +

+ Get paid to JOIN and paid to RETIRE

- You get an up front bonus to join us, and we offer a complementary succession plan whenever you decide it's time to leave the business.

+ Affiliation Choice & Payout

- We support both W2 (employee) and 1099 (independent business owner) affiliation options with a very generous payout.
- We also leverage cost savings due to shared resources, reduced overhead / platform expenses and negotiated rates on key services.
- With either affiliation option, you ALWAYS own your business!

+ Business Continuity

- Short-term coverage if you are out of the office, and a long-term buyout offered in the event of death, disability, or retirement.

+ Transition Support

- We handle all the upfront aspects of your transition, from establishing your new LLC or S-Corp to your new logo and branding, as well as marketing, operations, office buildout / lease negotiations, technology, HR and comprehensive client transition support.

+ Business, HR and Compliance Support

- We are your first line of defense, handling many issues before you ever see them.
- We take the lead on your annual audit and escalate items to you only as necessary
- We can approve daily operational items and address most account escalations for you.
- We can help onboard new employees, help with performance management, and address any other issues as needed.

+ Office / Administration

- We can handle your payroll, administer your benefits, pay most of your bills, and handle other administrative matters for you.

+ Technology

- We offer front line IT support and consulting to include management of network hardware, computer and peripheral purchases, backup servers, and software.
- We also help with IT and Telecom vendor management.

+ Group Benefits

- As an Advisor, you can choose to run a portion of your business revenue through Conservant Financial to qualify for benefits.
- Your support staff can also be employed by Conservant Financial while remaining 100% dedicated to you and your team.
- Either scenario qualifies you or your team to receive a comprehensive suite of benefits: Health, Dental, Vision, Short & Long-Term Disability, and Life Insurance.

+ Creative Comradery

- We are a team of seasoned, credentialed professionals that came together for mutual benefit without the expectation of shared clients or revenue. Among our ranks we have multiple CFPs, a CFA, a Certified Executive Coach, a non-practicing attorney, and a non-practicing CPA.

+ Forward Thinking Leadership

- We are committed to remaining ahead of industry trends, such that we strive to help you retain all the benefits of independent ownership while still enjoying the same resources and proactive leadership of a big firm. For example, "How do we leverage evolving technologies?", or "Should we ever become an RIA vs remaining a FINRA managed business?" … we constantly ask the forward leaning questions so you can stay focused on what you do best.

INVESTED IN YOU

We are a select group of freedom minded Financial Advisors passionate about helping you make the move to fully supported independence!

Call us today for a confidential consultation!

Michael McClelland

Managing Principal

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