CG Advisor Network

Empowering Your Focus on Clients and Growth

We have the platform and technology solutions to support you on every step of the advisory journey while offering the freedom of independence.

Built by advisors for advisors.

What Independence is Supposed to Look Like

The CG Advisor Network (CGAN) was born from the pursuit of true independence, founded in 2005 by financial advisors working in captive advisor models. After taking stock of the wealth management space, CGAN founders realized that many advisors were looking to run their practices more efficiently, more effectively, and more independently. So they created a platform and back office support system that would enable them to transition smoothly from a large firm to their own shingle.

By working with a robust network of investment and technology partners, CGAN offers products and services that can compete with large firm offerings but at a much more competitive price – along with the control, customization and flexibility that so many wealth advisors are seeking today.

Big Enough to Matter, Small Enough to Care

For independent advisors, firm culture is king – and our culture at CGAN is all about giving advisors the control they want over the way they work while providing the infrastructure and support necessary to drive meaningful growth. We're the best of both worlds: **a big independent firm with a regional feel.**

Personalized Service & Support

You need real-time answers to complex questions. That's why we assign a dedicated service and support team to help you navigate through every step of the entire advisory journey. Together, we'll configure and execute the tailored back-office and investment management solution that's right for your firm–with no frustrating call centers or endless help ticket systems.

Challenges Facing Today's Independent Advisors

CGAN solves for the roadblocks keeping independent advisors from focusing on clients and firm growth, including:

- Scalability obstacles
- Technology constraints
- Staffing challenges
- Out-of-control operational costs
- Lack of succession planning
- Investment management burdens

CG Advisor Network

The Pillars of our Advisor Network

Finding More Time to Focus on What Matters Most: Building Client Relationships and Your Business

Independent Advisor Solutions

Drive growth and efficiency with innovative technology and dedicated support, including:

- A portfolio management platform that includes consolidated performance reporting, billing solutions, trading and rebalancing, and the flexibility of advisor-selected CRM and financial planning software
- Transition support including a dedicated service team and detailed project plan, setup with custodian of choice and broker-dealer if needed, assistance with client paperwork, prep and fulfillment, and technology training
- Compliance program including monitoring of regulatory requirements and registrations, third-party consultant monitoring, advertising and marketing review and E&O insurance
- Marketing and sales support including a branded portal and mobile app and customizable prospecting campaigns and workflows

Next Generation Consulting

Bring your independent firm vision to life with built-in business coaching resources and support:

- Firm valuation and benchmarking metrics
- Access to client experience strategies and workflows
- Deal structuring and financing guidance for the purchase of sunsetting advisory practices
- Consultation resources for business formation, firm structure and compensation planning
- Assistance with succession and exit planning through full and partial acquisitions
- Support with sourcing and onboarding additional advisors to create pathways for career and talent development
- Educational content and resources including investment market updates, an annual advisor conference and peer-to-peer networking

Investment Management

Leverage private client investment solutions based on freedom, control and customization:

- Advisor-managed investment portfolios driven by your investment philosophy, including discretionary managed models with sleeve-level trading, support maintaining and trading existing models and an open-architecture investment platform with multi-custodial capabilities
- Built-in investment management solutions, including high-net-worth client strategies utilizing Unified Managed Householding with tax-intelligent implementation, top-down strategic allocations flexible enough to employ third-party manager strategies, risk-based asset allocation portfolio, income-focused solutions and cost-effective ETF portfolios
- Additional services including alternative investment offerings (institutional private equity and hedge fund strategies), Investment Committee guidance and efficient, automated tiered account solutions

CG Advisor Network

By offloading the back-office and investment management burden to CG Advisor Network, you'll be able to create customized portfolios to scale and streamline workflows without giving up any control of the process. Our tech-driven platform has been a real gamechanger for many advisors, improving their business while giving them more time to concentrate on growing it.

Who We Help

Established RIAs looking for a strategic partner to help them reach their next level of growth while enabling their focus on clients and running their businesses.

Breakaway Advisors seeking an independent, entrepreneurial approach to running their practices, including client ownership and the ability to create true enterprise value.

Independent Broker-Dealer Advisors who want a customized approach to client wealth management and a revenue model that matches the services they provide.

Advisors Seeking an Exit on their terms, who need a partner that allows them to reap the rewards of their efforts while continuing to enable a superior client experience.

CGAN Vision and Values

Our vision is to create a sustainable business that promotes leadership and growth while positively impacting the financial security of our clients and employees.

Knowledge

Maintaining a culture of continuous learning and sharing of experiences to encourage staff growth and best help our clients.

Visionary Leadership

Striving to solve the challenges of the future.

Innovation

Inspiring creativity and change to provide adaptive solutions.

Community

Supporting every relationship through charitable work, giving and collective winning.

Authenticity

Maintaining exceptional ethical standards rooted in honesty, integrity and transparency.

Relationships

Engaging in intentional interactions to nurture respect, trust and open communication.

Want to learn more about our powerful platform?

Get in touch with our experienced team.

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Our Leadership

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