CG Advisor Network

Our 3-Step Transition Process

Our detailed transition project plan and dedicated service team will support you every step of the way as you realize and implement your ideal business model.

Your Business. Your Goals. Our Support.

Building Your Business

We work to understand every aspect of your firm vision to align it with your goals including:

- Consulting on firm structure and strategy
- Brand and marketing coordination
- Client experience requirements
- Financial modeling and growth planning
- Investment platform and manager selection

Transitioning Your Business

Once all the pieces are in place, we're here to organize and execute your move including:

- Client communication and paperwork distribution
- Compliance licensing and registration
- Aligning advisory and brokerage resources
- Technology implementation and training
- Custodian setup and asset mapping

Ensuring Continued Success

Once your business has been established and your clients have successfully transitioned, we're here to support you by providing:

- Dedicated advisor support resources
- Practice analytics & key performance indicators
- Assistance with future growth planning and succession
- Investment commentary and market updates
- Annual conference and peer networking events

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Pathway to Transitioning Your Business

- **Determine** your ideal business model
- **Establish** a project plan and investment design
- **Select** custodian and technology partners
- **Coordinate** and execute client outreach
- **Complete** compliance documents

Launch Your Firm

- **Provide** ongoing investment and operational support
- **Fortify** practice management and marketing techniques
- **Nurture** business consulting and efficiency services

CG Advisor Network

Talk with us

Learn how we can support you as an independent advisor.

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