



CGAN Achieve



The State of CGAN



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Focusing Our **Mission**

To be the preferred resource for Advisors to strategically grow and operate their business for the future.



Succeed_



- ❖ Orion: Client Reporting
- ❖ Managed Strategies
- ❖ Request System 2.0



- ❖ Investment Committee Expanded
- ❖ Attract Businesses with Cash Strategies



- ❖ Custodial Landscape
- ❖ Advisor Tech
- ❖ Regulatory Environment



01

Tools

Investment Strategies, Technology, Core Processes...to focus on what you do best.

02

Ideas

To stay competitive in a changing world.

03

Advocacy/Partnership

Confidence and comfort in a strategic partner.



2023

Message

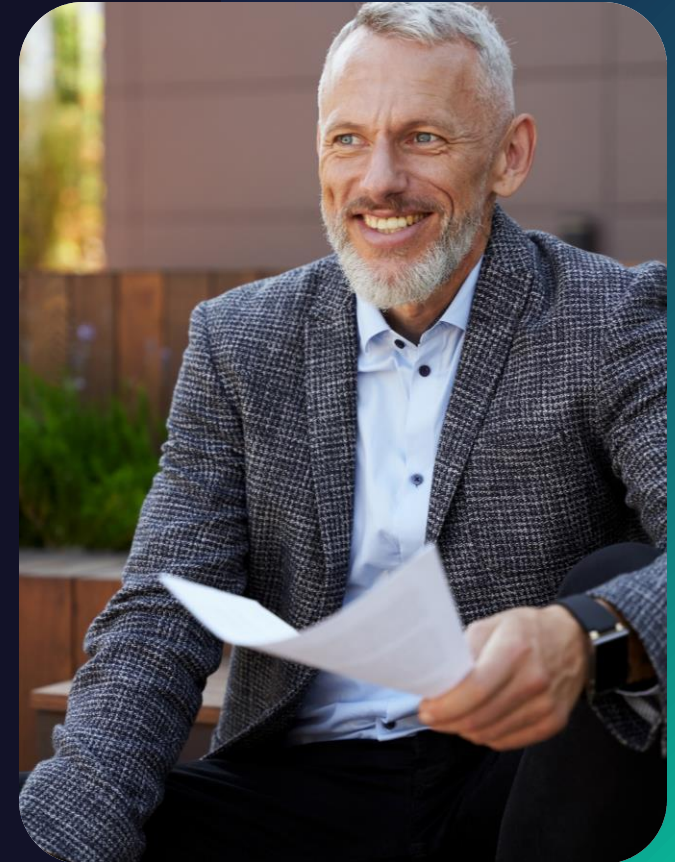
01

Changes for the industry ahead and fast

02

Focus points for advisor to:

- Clarify value proposition and strategy clearly to identify target market segments
- Develop a plan to achieve levels of practice and operational efficiency
- Strongly consider plans to retain and manage information





2024 Message

01

Changes continue...faster than expected – opportunities to grow existing firms

- Challenges to achieve operational efficiency
- Cash Rates...we can innovate faster than banks

02

Industry moving from independent open-source idea sharing to a closed network

- Fintech being more complex

03

Opportunities – Niche & Brand

04

Scaling

- Advisors spend 25% more time on asset management than client interactions (12.2 vs 9.6 hr./week)

05

Practice Model & Teams

06

M & A



CGAN **2024** Initiatives

01

Custodian Changes

Culture Strategy & Advocacy

02

Portfolio Offering

Simplify, Clarify Message & Communicate to Strategy

03

Establish RM CGAN Contact to Facilitate Adoption Communication & Problem Solving

04

Create a Systematic Approach and Delivery System of Strategies & Services for Advisors

Risk Managed, Goal Based, Alternatives

05

Create Reliable Systems and Core Processes for Advisors to Leverage in their Firm and with Clients



In executing our mission, we take seriously our responsibility to select vendors **not currently** or intentionally competing in the industry and whose strategy is to **support advisors** to serve their clients.

Schwab, ARBRY Acquire Minority Interest in Dynasty Partners

Vanguard Offering WM Services to Advisors

Fidelity Extends Hiring Spree, Aims for 12,000 New Staffers

Empower Closes Acquisition of Prudential Financial Retirement Business





What You Can **Expect** From Us _

Value Proposition

Providing tools to support the growth and operations of their firm.

Tools/Goals

Ideas and strategies to stay competitive in a changing world.

Advocacy/Partnership

Provide confidence and comfort in a strategic partner.



Commitment

To keep you and your firm focused on what you do best.

Systems Alignment

Keeping up with current technology and systems that align with your needs and keeping you updated on all future roadmaps in development.

Practice Optimization

Best practice ideas to use your data for dashboard creation, business intelligence, and management level KPI's.



Thank You_

For Your Attention

cgadvsionetwork.com

CGAN ACHIEVE

