

Brand Asset Management Group  
A Mosaic of Financial Experts

# YOUR PATHWAY TO INDEPENDENCE



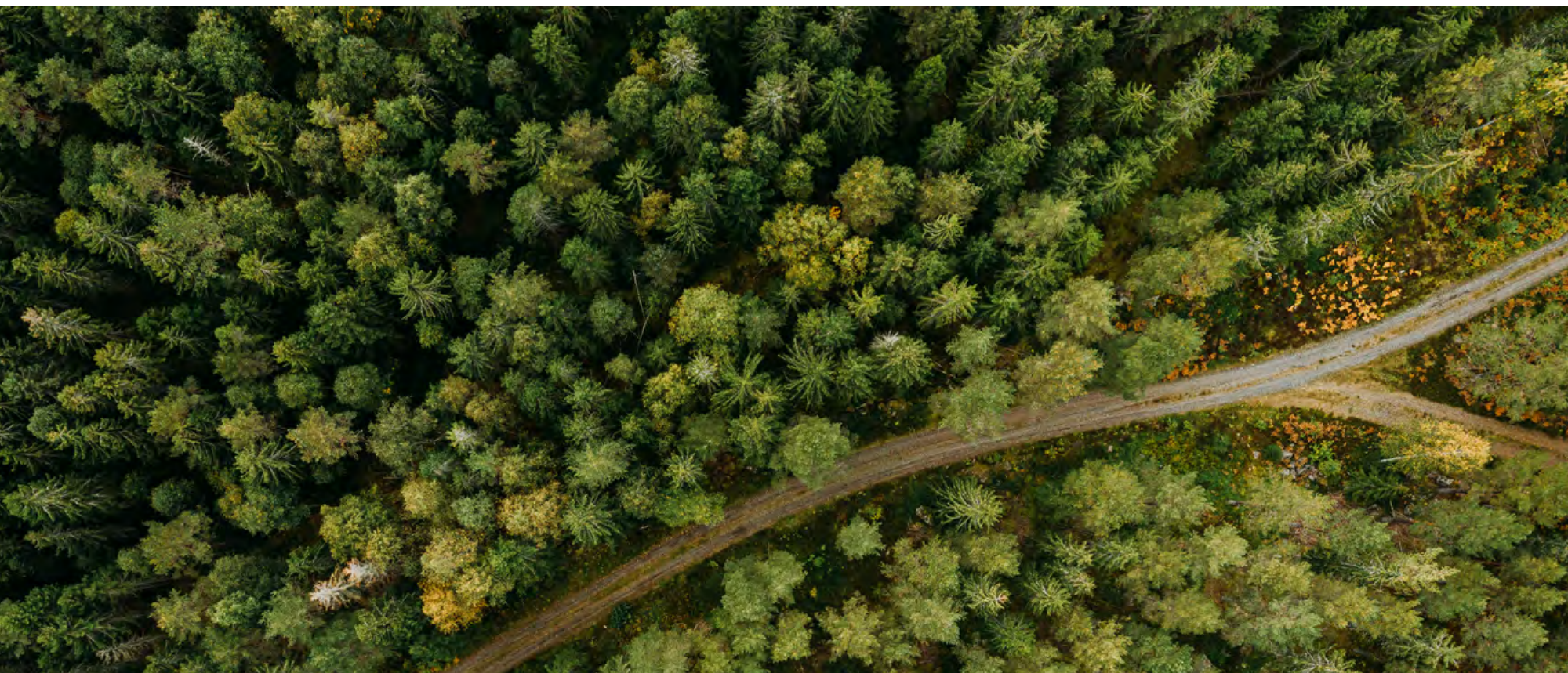
# Who do you work for?

It's a simple question, but in wealth management, it can be a difficult one to answer with a high degree of certainty.

Do you work for your clients in the purest sense of the word? Or do you feel pressure to take certain actions (and avoid others) in the interest of your firm, your managers, or your own bottom line? For many advisors, it's a blend of these competing interests.

We know these conflicts of interest exist because our founder, and many members of our team today, spent time at firms where sales incentives and bonus programs influence the type of products and services that clients receive.

From this lived experience, we took a different path.





# The independent channel is growing, and innovation is being rewarded.

Today, we are in the midst of a mass migration to the independent channel. Advisors are making the move, client assets are following, and the value of objective advice within the marketplace is growing.

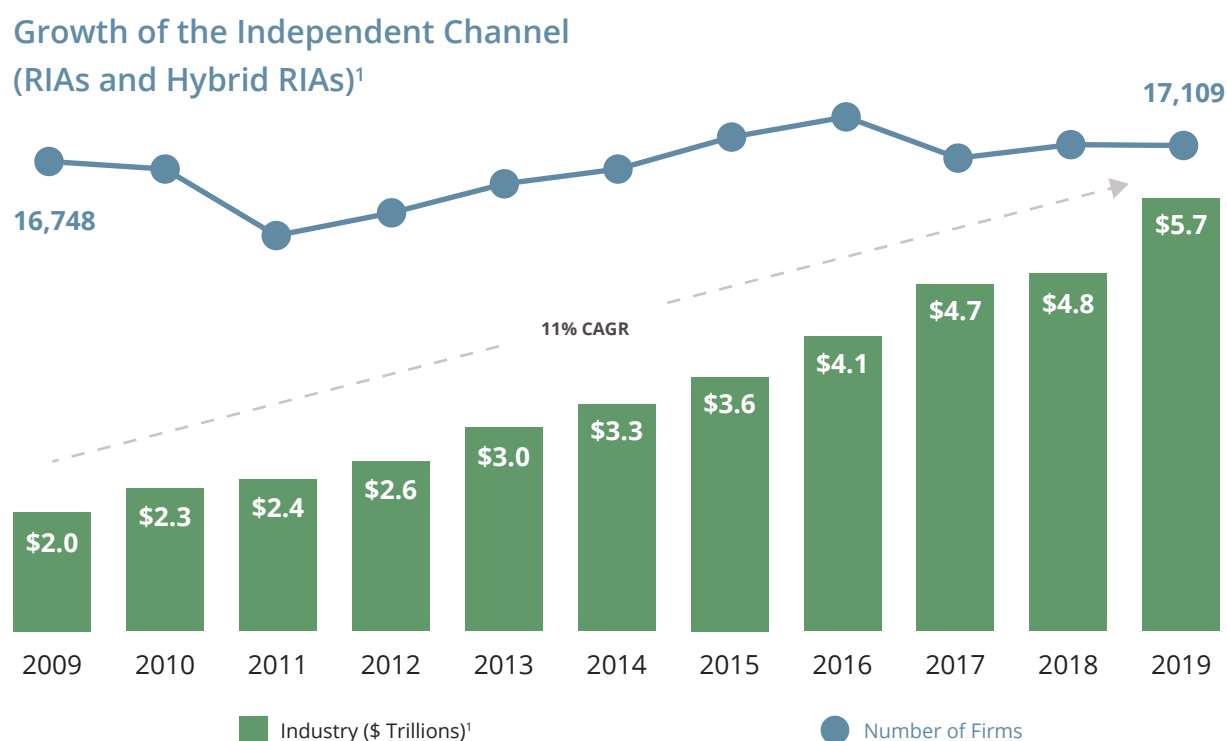
Once considered a fringe corner of the marketplace, the independent wealth management channel has matured, stabilized, and is leading the way forward.

In 2019, independent advisors (defined as RIAs and hybrid RIAs) managed \$5.7 trillion in client assets, an 11% CAGR from 2009.<sup>1</sup>

Taken on net, RIAs added 1,647 employees during 2020. During this same period, the wirehouse channel lost a net total of 1,609 team members.<sup>2</sup>

<sup>1</sup> Charles Schwab, *The RIA Industry: No one is staying in their lane, and that's a good thing*

<sup>2</sup> InvestmentNews, *RIAs led in a year of recruiting slowed by the pandemic*





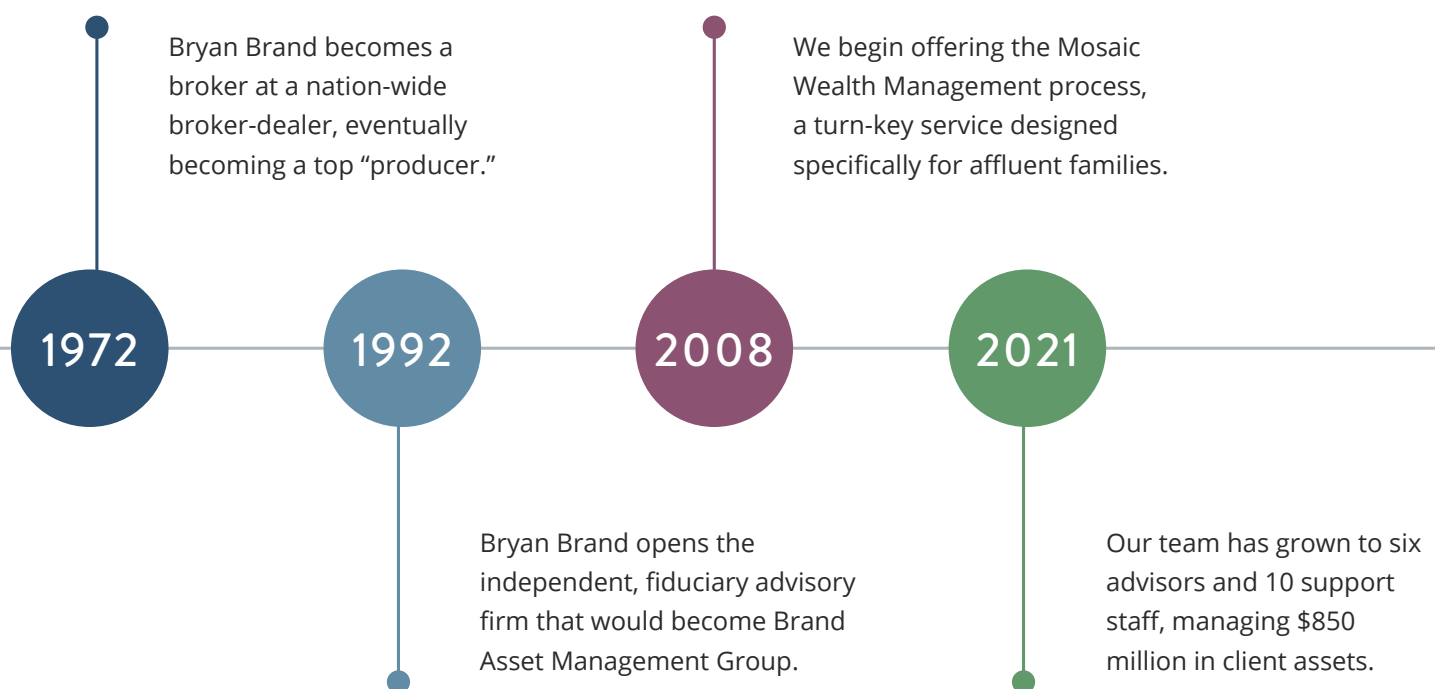
# Our story

Our founder, Bryan Brand, was a top “producer” at a major broker-dealer in the late 1980s. Like you, he wasn’t content with the conflicts of interest that were — and still are — commonplace within the wealth management industry.

By 1992, he had left the broker-dealer world and started the firm that would become Brand Asset Management Group.

During the first several years of this transition, he spent his own family’s wealth to ensure that the business made it through the move to independence.

For Bryan, the decision to go independent was a significant financial burden, but that doesn’t need to be the path for advisors who are interested in moving to the independent space today.





# Who we serve

Today, we serve 250+ families using a team-based and client-driven process. We serve multi-generational families who need a team of advisors to provide the full suite of wealth management services.

All of our work is through the lens of total wealth management. This means that we bring to bear resources in all aspects of a client's financial life:

- Investment Advice
- Tax Planning
- Risk Management
- Retirement Planning
- Estate Planning
- Education Funding
- Philanthropic Goals
- Legacy Planning





# How we work

We have redesigned the services that our clients receive from their trusted advisors. We bring their core advisors to one table, and we ensure that they are working in total alignment to support our client's financial well-being.

For tax planning and estate planning, the general fees from that planning are covered by our wealth management fee

so that the client doesn't pay directly for most of those services. This approach helps streamline the planning process and to remove gaps in thinking and execution.

This all-in, more comprehensive model is made possible by our fee-only model which ties our compensation directly to assets under management.



## Investment Advice

Goal-driven and product agnostic



## Estate Planning

A close relationship, that's value-driven



## Tax Planning

Strategic planning and tax filing



## Education Funding

Tax-efficient and empowering



## Risk Management

Objective insurance guidance



## Philanthropic Goals

Legacy-driven and meaningful



## Retirement Planning

Up to, and through, retirement



## Legacy Planning

Guiding the next generation



# The right team is everything.

For any advisor entering the independent channel, finding the right cultural and professional fit is critical to their success. That also holds true for a growing firm looking for the right people to join their team.

## Are we the right fit for you?

When joining our team, you can expect...

- ✓ World-class teammates to support your new path
- ✓ A dedicated operational team to support the transition
- ✓ Compliance support and record-keeping
- ✓ Best-of-breed custodial relationships and trade execution
- ✓ Leading tools and technology to support the planning process
- ✓ An open-architecture platform, without product or solution restrictions
- ✓ The scale and network required to support your work

## Are you the right fit for us?

We are looking for advisors with...

- ✓ A love of serving people and families
- ✓ A relentless drive to be independent
- ✓ An ability to give tangible counsel and advice
- ✓ Strong analytical skills and tactical follow-through
- ✓ A desire to work in a team-based and collaborative environment
- ✓ A passion for being a central piece of a growing enterprise
- ✓ The desire and ability to lead people forward



# We look forward to hearing from you.

We would value the opportunity to learn more about you and your business. To speak with one of our principals, call the number below to schedule a confidential and informative discussion.



BrandAMG.com

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