



# Investment Advisors and RIA owners

The Investment Advisory landscape is changing. What's on your horizon?

## LEARN HOW YOUR PRACTICE AND YOUR PAY-OUT CAN IMPROVE!

If you would rather **focus on what's right for your clients instead of on product or sales quotas, or if you'd like to concentrate on relationships instead of managing portfolios**, you should consider partnering with Claraphi Advisory Network. You'll have access to top-notch investment management and insurance services<sup>1</sup>, complemented by highly responsive operations, product and sales specialists. You'll free up time for client relationships, friends, and family without sacrificing the quality and care you devote to your practice.

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to complete a confidential profile and schedule a call, a meeting, or a demo of our platform

- Custom-built portfolios for each client's unique risk tolerance and income, growth, or capital preservation needs
- Complimentary evaluation of current client portfolios using *Advisory World*, *Morningstar*, and *Personal Fund*
- Detailed proposal design and consultation involving portfolio strategists, advisors, and prospective clients
- Ongoing communication of rationale concerning investment strategies, rebalancing, and product due diligence
- Managed accounts using stocks, ETFs, CE funds, 3rd party managers, alternatives, and insurance products<sup>2</sup>
- High-touch insurance case design, knowledgeable underwriting, and unparalleled case management
- Creative investment and insurance solutions for tax minimization, wealth preservation, and risk management
- Fully-loaded advisor and client portals with drill-down view and charting of activity, holdings, and performance
- Multiple custodians: *Fidelity*, *Schwab*, *Folio*, *Kingdom Trust*, and *Midland*, integrated through Claraphi's network
- Technology interfaces with leading financial planning, CRM, document management, and aggregation providers
- Progressive marketing and business development assistance to keep your practice promoted and growing
- Competitive fees and compensation with impressive earnings potential - **UP TO 100% PAY-OUT!**

## NOW IS THE PERFECT TIME TO SECURE YOUR FUTURE.

***We understand there are many things to consider when making a change. Whether you're interested in growing, selling, or simply maintaining your current practice with our guidance and resources, we're available to help.***

**Roxanna Guinan, 561-632-0560, [rguinan@claraphi.com](mailto:rguinan@claraphi.com)**

**Vali Nasr, 949-701-7183, [vnasr@claraphi.com](mailto:vnasr@claraphi.com)**



### Office Locations

Laguna Hills, CA | Vero Beach, FL | New York, NY  
[www.claraphi.com](http://www.claraphi.com)

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