On your own, but not alone

Experience the difference of real practice ownership

Enterprise Partner:

Pivotal Financial Advisors

Pivotal Financial Advisors LLC

Focus on what you do best – we will assist with the rest

We understand what it means to be in business for yourself, but not necessarily by yourself.

You demand the independence to run your business in a way that best meets the needs of your clients and the goals for your practice. You deserve the opportunity to draw on the resources and expertise that are best pooled in combination with other financial professionals who share your commitment to clients.

Pivotal Financial Advisors is an external Office of Supervisory Jurisdiction (OSJ) for Cambridge, a broker-dealer and Registered Investment Advisor (RIA), serving as your business-building partner.

We offer comprehensive consulting on many topics:

Efficient office systems	Leading industry-based technology	Product and portfolio management insight
Commission and fee-based platforms	Customized marketing materials	Networking and regional meetings
Business-building programs and executive guidance	Innovative solutions for outsourcing	Training office support

You can focus on what you do best: developing client relationships, gathering assets, and building your business. We focus on what we do best: supporting your practice needs and providing regulatory supervision. In addition to an alliance with experienced business colleagues, you become part of a professional family that shares proven techniques, highlights new opportunities, and propels your business to new levels of success with our credentialed professionals. Your clients are yours, not ours or the broker-dealer's.

Our team can help in a variety of ways:

Succession and continuity planning	Client case management	Technology guidance and assistance
Coaching and consulting	Training for you and your staff	Compliance oversight

Consider an opportunity to build an independent practice with the support of a larger organization. Consider Pivotal Financial Advisors.

An alliance of independents

Pivotal Financial Advisors LLC

Monte Ferguson
Enterprise Principal, Founder

Parker Consaul
Enterprise Principal

Pivotal Financial Advisors is an independent financial services firm established in 2008 to help financial professionals make the pivotal practice decisions in life. Headquartered in Fort Worth, Texas, we offer comprehensive practice guidance across the U.S. for financial professionals serving their client families. Our support begins with compliance and extends to all aspects of practice consulting as well as organic growth.

We are dedicated to helping financial professionals develop their skills, attain their professional goals, and build their practice the way that makes the most sense for them. We take pride in guiding them through every step of the transition process and providing continuing support through education, training, and due diligence on products and services. With their success in mind, our team (see website: pivotalfinancialadvisors.com) helps financial professionals develop a business plan while giving them the freedom to run their business in a manner that best serves their clients.

Cambridge Investment Research, Inc.

Cambridge believes in honoring the entrepreneurial spirit of the financial professional. Instead of asking financial professionals to fit into a mold, they are empowered with a vast menu of compliance-friendly programs, products, and services. Cambridge's service-oriented culture is driven by unwavering core values of integrity, commitment, flexibility, and kindness. Cambridge is proud to be the broker-dealer of choice for independent financial professionals who share these core values.

Cambridge is committed to true independence, with the goal of remaining privately owned. Cambridge has spent several decades perfecting the succession plan now in place, which includes ownership by management and indirect ownership by associates of the firm. Since its inception in 1981[1], Cambridge has continually put the objectivity of its financial professionals first to ensure the long-term success of the financial services industry, financial professionals, and clients. It offers one of the largest footprints of products and services available in the industry, and is committed to providing the highest level of flexibility and choice to its financial professionals.

[1]Cambridge and its predecessor broker-dealer

Experience the Pivotal difference

If you are looking to grow your independent business and want a dynamic support group of financial professionals with years of proven success, let's talk. You can expect a no-nonsense, hands-on approach as we work together to build your business. You steer the direction and choose the solutions that best fit your needs, while we offer support to help you achieve your goals.

Is it time you experienced the Pivotal difference? Contact us today if you're interested in growing your independent business and want a dynamic support group of credentialed, experienced financial principals.

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PivotalFinancial Advisors LLC

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