On your own, but not alone

Experience the difference of real practice ownership

Pivotal Financial Advisors LLC

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1.

YOU ARE HERE

As a successful financial advisor, you help your clients grow their wealth, retire comfortably, and achieve their financial goals. In other words, you make them more successful.

IN THIS PIVOTAL TIME, WHO IS HELPING YOU? Consider our roadmap for successfully partnering with independent professionals and how others leverage PFA's value proposition.

2.

Compliance

Make compliance easy with dedicated support and proactive guidance. You'll have access to a team of experienced compliance professionals who will help you navigate the regulatory landscape, develop best practices, and avoid potential pitfalls.

- Experienced OSJ designees
- Common-sense solutions
- Proactive trainings and guidance
- In-depth partnership with Cambridge Investment Research, Inc.

3.

Consulting

Dedicated support goes beyond regulatory oversight of your practice. We partner with your team, focused on driving efficiencies through consulting on every aspect of your business.

- Process optimization
- Client segmentation
- Outsourcing solutions
- Training opportunities
- Exclusive events
- Succession planning
- Product recommendations
- Marketing support

4.

Recruiting

Want to grow or simply collaborate? Accelerate your business growth by placing qualified advisors in your office. Having a larger presence in your area creates new opportunities and can mean more clients come through your door. As always, you decide if you want to puruse this unique path for growth.

- Let Pivotal's team do the recruitment work
- Become a branch manager within our group
- Create a community of like-minded professionals
- Leverage expertise of advisors in your office

5.

A NEW WAY TO DO BUSINESS

Opportunity? We certainly think so, let's find out. With the appropriate application of compliance, consulting, and recruiting support, your business along with Pivotal Financial Advisors can soar to new heights. Leverage our commitment to service and professional expertise to grow your practice and enjoy serving your clients with confidence. This could be the opportunity you've been waiting for to join a community of like-minded professionals who share your passion and vision.

Is This A Pivotal Moment? Make The Right Choice With Pivotal Financial Advisors

Contact us to start a confidential conversation at:

817-201-8776

817-600-7368

515-370-1309

About Pivotal Financial Advisors, LLC
Pivotal Financial Advisors is an independent financial services firm founded in 2008 to help financial professionals make pivotal practice decisions in life. Headquartered in Fort Worth, Texas, they offer comprehensive compliance guidance and practice management services to leading professionals across the country.

About Cambridge
Pivotal has chosen Cambridge Investment Research, Inc. as their financial solutions firm. As a leading broker-dealer and RIA, Cambridge has long embraced the spirit of true independence and their service-oriented culture is driven by unwavering core values of integrity, commitment, flexibility, and kindness. They offer one of the largest footprints of products and services available within the industry.

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Pivotal Financial Advisors LLC

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