five ways Benchmark Wealth Managment adds value to your practice

BENCHMARK wealth management

LPL Financial
Independent Advisor Services


go
indep


penden


but don't
go it


one

1

run your book
your way

We're here to support you and help you succeed.

Your book is your business, and the equity you build in it belongs to you alone. We don't look over your shoulder. We will never call your clients or tell you how to conduct your business.

As an affiliate of our firm you'll enjoy complete autonomy to choose the type of practice you want, to pursue the type of client you want and to create the revenue model that suits you best. You can sell the products you want and choose the advisory platforms that make sense for you.

2

focus

on your clients

We handle compliance and recordkeeping.

For many advisors considering true independence, the thought of dealing with compliance and regulatory requirements may be challenging. But it’s easy to get up and running with us. We take care of compliance and recordkeeping so you can focus on providing exceptional service to your clients and meeting with prospects to grow your business.

3

start strong
on day one

Your office is ready and waiting for you.

Finding and leasing office space, buying or leasing furniture and equipment, contacting communications providers, installing computers and network connections—the details of setting up on your own can keep you from the real business of reaching out to clients and prospects.

When you affiliate with our firm, we'll have everything ready for you on your first day. Your telephone and computer workstation are connected and ready to go. Copier, fax—all the infrastructure. Just show up and get started.

4

control
your expenses

You save money by working with us.

Advisors are often concerned about the expenses of running an office on their own. When you join us, your costs will be predictable and you'll save money by sharing expenses on everything from office space and utilities to copy paper and equipment.

5

share

some good ideas

You benefit from our experience.

We've learned how to get things done in the smoothest way possible for our advisors, and our size gives us additional clout. We've built strong relationships at LPL Financial and with other entities.

Working in a collegial environment with other advisors and sharing ideas and information will also help lift your business. You'll benefit from the knowledge and experience of your colleagues. Your clients and prospects will gain confidence when they meet you in an impressive office, surrounded by other professionals.

If you think you're ready to go independent with Benchmark Wealth Management, call David T. Schaper at (714) 633-4453.