Credent
WEALTH MANAGEMENT

ADVISORS WHO CARE AS MUCH AS YOU DO

FIND YOUR FOREVER FIRM

Credent shares the values that made you seek independence in the first place.

Are you a **fee-only or hybrid advisor** looking for more support without sacrificing your freedom?

Do **you care as much about helping your clients reach their goals as they do?** Did you go independent because you were **tired of the way that big Wall Street firms did things**?

THEN YOU MAY HAVE JUST FOUND **YOUR FOREVER FIRM.**

Through **Credent Advisor Solutions,** we let you pick the level of support you need to **make running your practice easier.**

Services include:

Use all of our services or just the ones you need.

Client Services
Let our client support team handle your back-office tasks, deal with custodians, and oversee all facets of account maintenance.

Technology Solutions
Utilize our best-in-class technology to keep your data accessible, organized, and secure.

Operational Support
Our centralized services team will execute advisor-directed trades, conduct billing, and provide all aspects of reporting for your business and clients.

Succession Planning
We'll put together a flexible timeline and terms that meet your needs and help you capitalize on your firm's value.

Investment Management
Tailor your approach, from Advisor as Portfolio Manager to complete outsourcing, depending on how deeply you want to be involved.

Transition Support
Our experienced team has transitioned firms of all sizes — from solo practitioners to large ensembles. We'll make the process simple.

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WHO ARE YOU?

We've helped all kinds of advisors, from fee-only to hybrid, but we work best with highly client-centric individuals who fall into one of three groups:

Growing Advisors
Advisors who are expanding their firms, ready to benefit from a strategic partner, enhance client options, and gain time for accelerated growth.

Lifestyle Advisors
Experienced advisors who can benefit from our back-office support and expanded offerings to reclaim valuable time while maintaining client involvement.

Transitioning Advisors
Advisors planning to retire within 3-7 years, seeking to capitalize on the value of their firm through succession planning while ensuring their clients receive the same level of care and commitment they've come to expect.

WHO ARE WE?

For our clients, there's more to money than the bottom line on a spreadsheet. And when the financial advisors care as much the clients do, it's about more than money to them, too. At Credent, our advisors become an integral part of the lives our clients are creating. That's the reason we exist, and there's nothing that brings us greater fulfillment than seeing our clients succeed.

4 WAYS TO BENEFIT FROM
Credent Advisor Solutions

MAKE SPACE FOR MORE
Maintain your RIA, **keep full control** over all aspects of your business, and **increase your productivity** with our services.

PARTNER UP
Credent makes a minority investment in your firm. **You retain control and get support for operations and growth.**

JOIN OUR RIA
Join our corporate RIA, but **maintain your brand, investment strategies, and business operations** while **offloading compliance**.

CAPITALIZE ON YOUR LIFE'S WORK
Merge your practice with Credent Wealth Management and **take advantage of everything we have to offer** you, your clients, and your team.

A PARTNER OF CX INSTITUTIONAL

(260) 333-5123 JOINCREDENTWEALTH.COM