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Dear Advisor,

### **Is wearing all the hats holding you back?**

When advisors wear too many hats, the client experience suffers. What more could you do for the hardworking Americans you serve if you had people to help you:

- Build and manage an internal investment platform
- Recruit, hire, and train team members
- Handle account maintenance, paperwork, trading, & rebalancing
- Maintain regulatory compliance and filings

Even if you know you can't do it all, how do you find a culture-fit partner? Look for:

- **A partner that values culture over scale.** Our intentional growth means we're selective about finding the right partners who share our values.
- **A forever firm.** We believe in what we've built and how we've built it, and we are not willing to compromise by growing without quality or letting an outside voice have too much influence.
- **A firm un beholden to Wall Street.** We're 100% independent and never push products or strategies that aren't right for clients. Our investment platform's vertical integration ensures we control the solutions we offer and can pass cost savings to clients.
- **More than just an investment manager.** We think of wealth management as a three-legged stool — service, planning, & investment solutions — built on a foundation of the highest standards and delivered through an ever-improving team and process.

Recently, Tom Knippa, our Partner Integration Advisor and a former client-facing advisor, shared his experience working alongside a firm with a standardized approach that allows us to serve clients with excellence while maintaining growth.

Are we a good match for you?

**Reply or [grab time on my calendar](#) to discuss the impact Credent can have on your clients and teams.**

Best,

Joe Hauptert

Chief Business Officer  
Credent Wealth Management