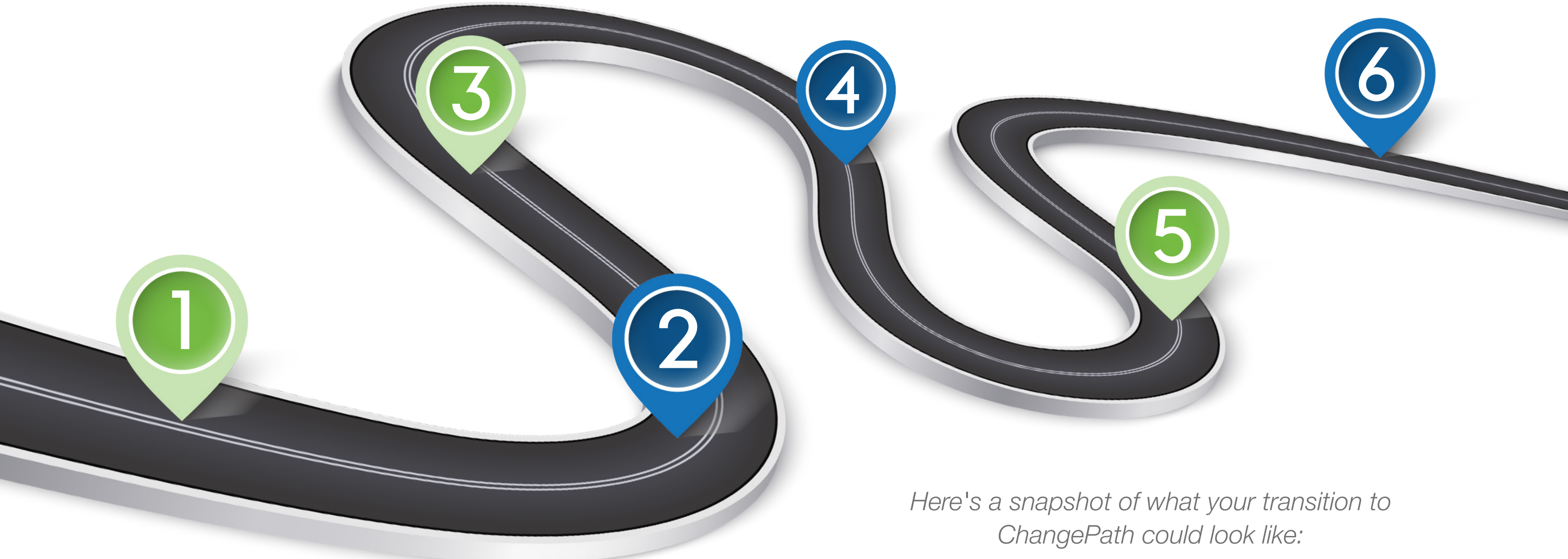
Your Transition Roadmap

When you work with ChangePath, you're choosing a firm that will be with you every step of the way. Your transition is just the beginning. From your initial contact with our experienced representatives through specialized training and education designed to help you get the most from our resources to business development specialists who will help you fine-tune and grow your practice, we're committed to helping you succeed.

Typically, transitioning advisors have all client information and assets moved to ChangePath and their staffs fully trained on tools and technology in just two months.



Here's a snapshot of what your transition to ChangePath could look like:

PHASE 1

PREPARE FOR YOUR MOVE

We will create a comprehensive transition plan and support you until you are fully acclimated to ChangePath.

PHASE 2

MAP YOUR BOOK

We will help you find products and solutions to help map your book of business to ChangePath.

PHASE 3

GO LIVE

You'll be guided through every step of the affiliation process so you're ready to address your clients' needs and start conducting business as soon as your licenses transfer.

PHASE 4

MOVE YOUR BUSINESS

We simplify repapering using customized support focused on account opening and transfers to ensure your book is transitioned smoothly— getting you back to 'business as usual' as quickly as possible.

PHASE 5

LEARN HOW TO TRANSACT BUSINESS

Maximize the use of ChangePath technology and resources with comprehensive training critical to your business.

PHASE 6

BEGIN TO GROW YOUR BUSINESS

Transition doesn't end with transferring clients and accounts. It's just the beginning. So we help you set up a compliant office, introduce you to our growth tools, and get you headed in the right direction with in-depth practice and advisory consultation.

ChangePath

www.changepath.com

Advisory Services offered through Change Path, LLC an Investment Advisor.