Founders Financial

Over 30 years servant leading independent advisors in pursuit of their unique enterprise dream.

Get to Know Founders Financial

Registration:	Clearing Through:	Assets Under Management:	Headquarters Location:
51 U.S. States and Territories	Pershing, Charles Schwab, Axos Advisor Services	Over $4.69B as of 12/2023	Towson, Maryland

A Legacy & Community Built Together

100%
PRIVATELY OWNED

AVERAGE PROFESSIONAL TENURE
26 years

AVERAGE YEARS WITH FOUNDERS
10+ years

$57,000,000
AVERAGE ASSETS UNDER MANAGEMENT PER MEMBER PARTNER

9th
GROSS REVENUE PER MEMBER PARTNER [1]

ADVISORS ANNUAL PRODUCTION GREATER THAN $100,000
80%

RETENTION RATE
98%

ADVISORS CONDUCTING FEE-BASED BUSINESS
93%

Our Purpose

SERVANT LEADERSHIP

We prioritize people and focus on serving others to create a positive impact in everything we do.

...

SHARED RESOURCES. SHARED VALUES.

An uncommon community of like-minded, values-based professionals who enjoy the fellowship, spirit, and uniqueness that is created by the sum of our parts.

...

BUILT BY & FOR

We are a partner, not a processor. Our interdependent culture founded on relationship empowers us to innovate and grow stronger together.

Build Your Own World & Break the Status Quo

1026 Cromwell Bridge Road, Suite 100 | Towson, Maryland 21286 (888) 523-1162 FoundersFinancial.com

[1] As reported by Financial Advisor: Independent Broker Dealer Review & Rankings (2023)

INNOVATE, ACCELERATE, AND GROW YOUR ENTERPRISE

Scaled Infinite Growth™

When the mechanics of your business are operating efficiently, your time and impact are unleashed and the magic of your leadership can shine through to the people you serve.

The Scaled Infinite Growth™ model brings together the best services, technologies, and programs to help you lead a purpose-rich, servant-led financial planning enterprise and achieve sustainable growth.

Included In Our Partnership

Strategic Enterprise®

Strategic Enterprise Program

Discover the Authentic Leader Within

A unique journey to unlock the CEO within to effectively lead others and liberate your spirit to find freedom.

Succession Planning

Establishing Your Legacy

Customized to your enterprise's unique needs and goals using innovative solutions and personal guidance to prepare your business and legacy for the future while protecting your clients.

Freedom Capital Management Strategies®

Second-Party Investment Management™

Your Investment Team & Brand

Elevate your investment offering by leveraging a differentiated and personalized suite of investment solutions that are branded to your firm and managed by our team of investment professionals.

We conduct every aspect of our business with the intentional purpose to serve others first so they can achieve their unique dream.

TRU Enterprise OS™

Technology

Integrated, Intelligent Tools & Technologies

An integrated suite of best-in-class technologies designed to deliver operational excellence, engaging client experiences, and protection through an integrated cybersecurity program.

Administrative Support

An Extension of Your Enterprise

Focus more time on serving your relationships and less on the administrative needs of the business through an outsourced administrative team that stays behind the scenes while keeping you front-and-center to the relationship.

Marketing & Communications

For Attracting New & Enhancing Existing Relationships

Branding and marketing resources to help you grow existing client relationships and develop new relationship opportunities.

Compliance & Operations

Protecting & Serving Your Enterprise

Protection in an ever-changing regulatory environment with a compliance team focused on building a relationship with you based on mutual trust.

Stakeholder Support Services

Your Personal Advocates

In-house, responsive, and dedicated support from a team you know and understands your unique enterprise needs. Receive the support you need and solve problems quickly the first time.

Member Transition & Training

Personalized & Customized

Assistance from a dedicated transition coordinator and training team who creates a personalized, guided transition process with one-on-one enterprise training provided along the way.

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