

Founders Financial

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

AT-A-GLANCE

Founders Financial

Registration

51 U.S. States and Territories

Clearing Through

Axos Advisor Services, Charles Schwab, Pershing

Assets Under Management

Over \$5.32B as of 12/2024

Headquarters

Towson, Maryland

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 and For

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

Our Mission

To positively impact the lives and professions of those we serve, always building a community of spirit and purpose as we grow our collective Human Quotient™.

A Legacy & Community Built Together



100% Privately Owned



Average Assets Under Management Per Rep

58
Million



Average Years with Founders

12
Years



Advisors Annual Production Greater Than \$100k

73
Percent



Advisor Retention Rate

98
Percent



Advisors Conducting Fee-Based Business

100
Percent



Highest Growth in Producing Reps

5th
IBD Elite 2024



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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

● 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

Grow and Enhance Your Relationships

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

● Freedom Capital Management Strategies® (FCMS)

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.

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.

Break the Status Quo & Build Your Own World.



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