



Interdependent Advisors

an OSJ of Peers

- DocuSign Technology
- Choice of Pershing, National Financial Clearing Platforms
- 20+ TPAMs, dozens of VAs, Interval Funds and alternatives
- Due Diligence Team
- 41 Registered Investment Advisors
- 11 support staff
- Offices in 11 states
- Transition and Training Programs
- VIP Virtual Assistant
- Plug & Play Marketing
- Bank & Credit Union Strategic Alliances
- 1.6+ Billion AUM
- Strategic Fixed Insurance Relationships
- A cooperative and idea sharing environment within OSJ
- Health Insurance Available (subject to state & county restrictions)