



# CHALICE™

FINANCIAL NETWORK

**45K**

Members

**330**

New Members  
this Month

**\$25K**

Avg. Savings per  
Member

April 16 Webcast | 2PM – 3PM ET



## Presented By



## Featuring



**Keith Gregg**  
Founder and CEO  
Chalice Financial Network



**Christopher Giles**  
Chief Information Officer  
Chalice Financial Network



**Derek Bruton**  
President  
Chalice Financial Network

# Understanding the Value & Benefits of a Digital Community



**Keith Gregg**  
Chairman and CEO

# Who is Chalice?



**Chalice Financial Network**  
is a member-benefit organization for  
financial advisors and independent  
business owners.



# What do We Do?

**Chalice Financial Network**  
delivers large firm economies of  
scale and efficiencies to small and  
mid-size firms.

# WHO'S LOOKING OUT FOR YOUR BEST INTERESTS?



**Can you name a professional trade organization for small to mid size independent Business Owners in the Financial Services Industry?**

# WHO'S LOOKING OUT FOR YOUR BEST INTERESTS?

There is a hodge-podge of associations supporting designations and firm interests – NONE of which are purely dedicated to supporting an Independent Business Owner in Wealth Management.





# WHY CHALICE?



## Chalice Fills an Industry Void:

- The first & only SaaS-based member benefit organization for independent business owners & financial advisors
- Solves the need for a professional trade association for 380,000+ Independent Financial Advisors and growing number of Independent RIAs
- Similar to:



## Target market:

Financial Advisors with **\$50mm-\$250mm** in assets under management (largest segment of IFAs & RIAs).

# WHAT IS THE CHALICE FINANCIAL NETWORK™?



Chalice Financial Network™ is a SaaS-based member benefit organization for independent business owners and financial advisors.

Membership provides intellectual capital, human capital, and financial capital to help advisors manage, grow and protect their business.

## Member benefits include access to:

- An enhanced technology stack and FinTech platform
- Comprehensive group healthcare coverage
- Bespoke website creation and lead generation services
- Exclusive, negotiated member pricing
- Peer-to-peer networking community
- Business valuation services and succession planning
- Access to capital and advisor loans



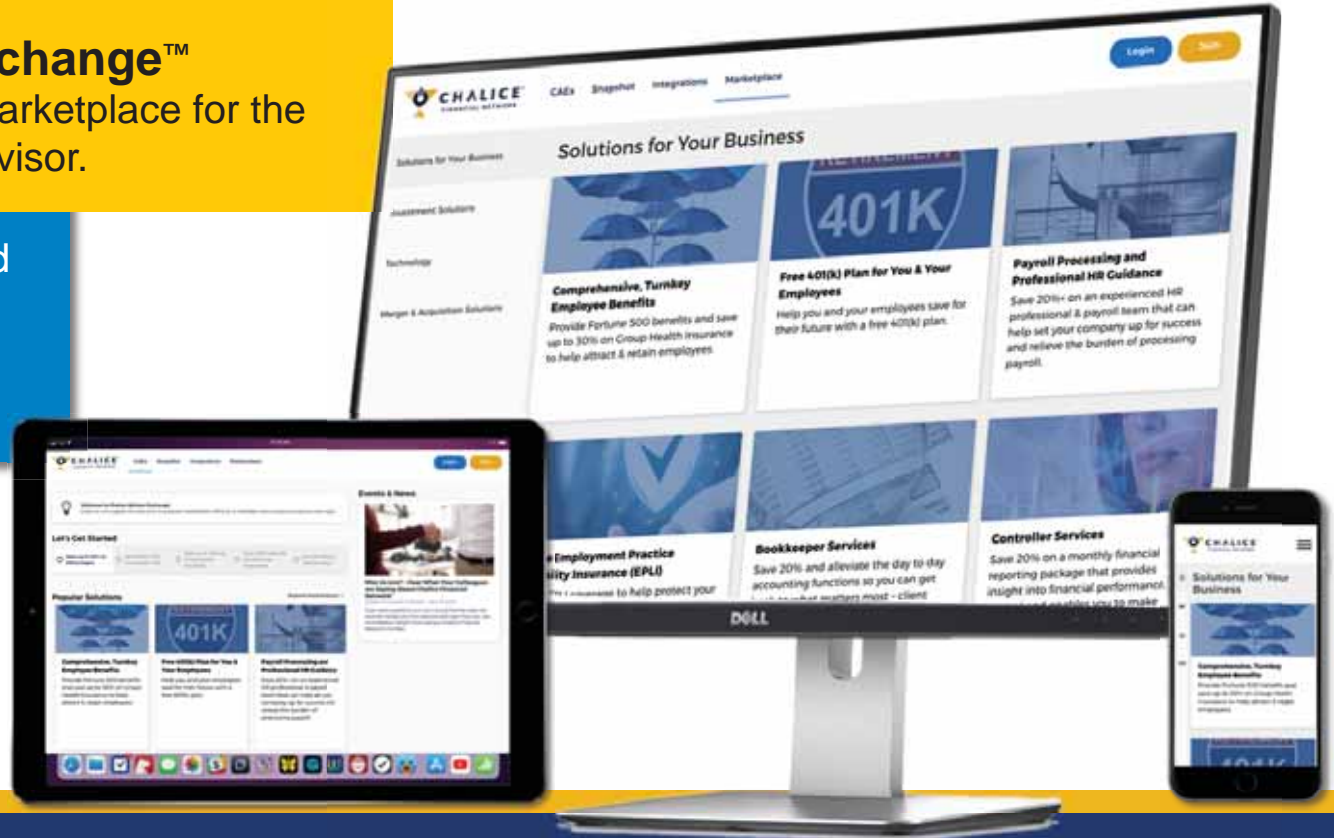
# THE POWER & CONVENIENCE OF THE DIGITAL MARKETPLACE



## Chalice Advisor Exchange™

Is the one-stop, digital marketplace for the independent financial advisor.

- ✓ One Password
- ✓ One Platform
- ✓ One Price
- ✓ Any Device



# SUCCESSION LINK: YOU ASKED – WE LISTENED!



**SL | Succession Link**

BUY • SELL • MERGE • NETWORK

- CFN acquired Succession Link in October 2018
- Largest digital marketplace and community of advisors in Financial Services – **Over 45,000 Members!**
- 3 Verticals – Financial Advisors, CPAs, and Insurance Agents

Recent Upgrades



Capital & resources to enhance match-making results



Dedicated Engagement Consultants



Improved qualification of Sellers and Buyers



Strong non-SBA lending solution

# SUCCESSION LINK: YOU ASKED – WE LISTENED!



**SL | Succession Link**

BUY • SELL • MERGE • NETWORK

- CFN Acquired Succession Link in October 2018
- Largest digital marketplace and community of Advisors in Financial Services – **Over 45,000 Members!**
- 3 Verticals – Financial Advisors, CPAs, and Insurance Agents

Future Upgrades



**Business Valuation Calculator**

# Meet Amazon Prime for **Advisors**



**Christopher Giles**  
Chief Innovation Officer



STRENGTH OF **WE** EMPOWERS A NETWORK OF **ME**™

**amazon**



+12 MILLION Products

Books/Music/TV/Device  
ECOSYSTEM

amazon

Recommended For ME

FREE 2<sup>nd</sup> Day Shipping



# Some Business or Tech Questions You May Face

- Do I need new \_\_\_\_\_?
  - Should I be buying something new?
  - How do I know what's best for me?
  - Holy S#&t, there are so many choices?
- I need help, but do I have to hire a new person to do \_\_\_\_\_?
- Listen, I know I want to provide \_\_\_\_\_ to my employees, but how can I afford it?
- Digital what? That might as well be a \_\_\_\_\_, too!



# Welcome to Chalice Advisor Exchange!

# Big Business Benefits on a Small Business Budget



Derek Bruton  
President

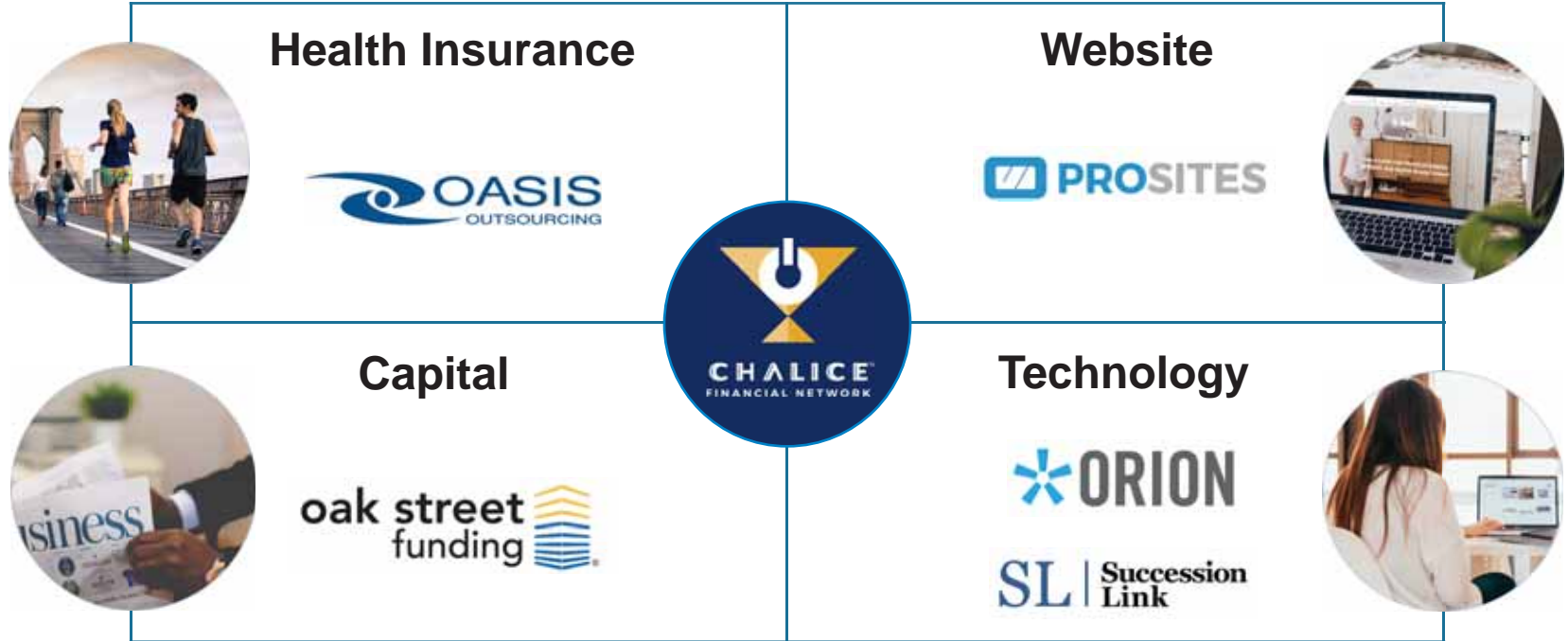


STRENGTH OF **WE** EMPOWERS A NETWORK OF **ME**™

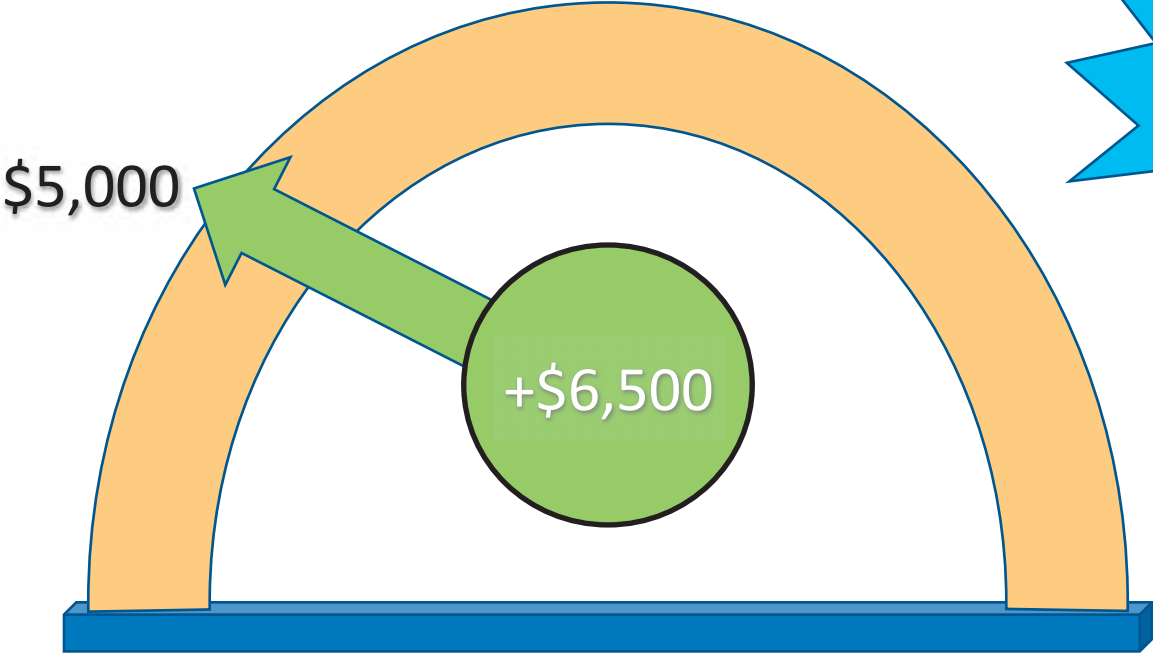
# Must-Have Tools for Small Businesses



Chalice Financial Network (CFN)  
has what your business needs now.

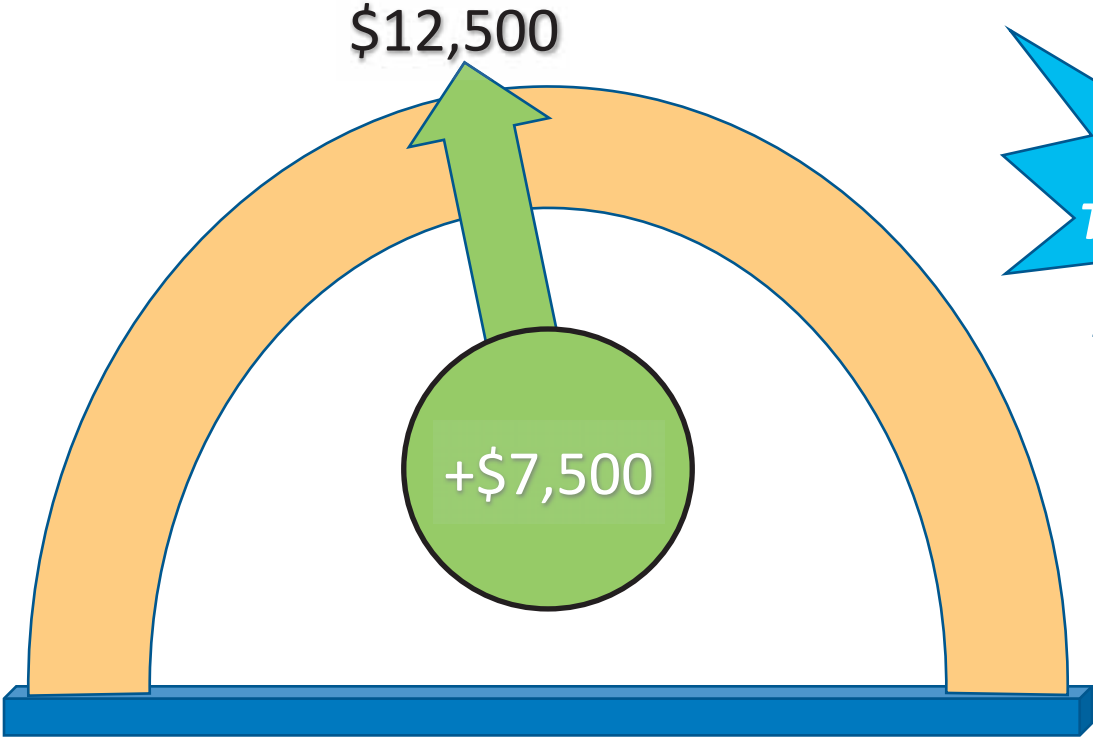


# What's The Value of a Chalice Membership?



*ProSites  
Website*

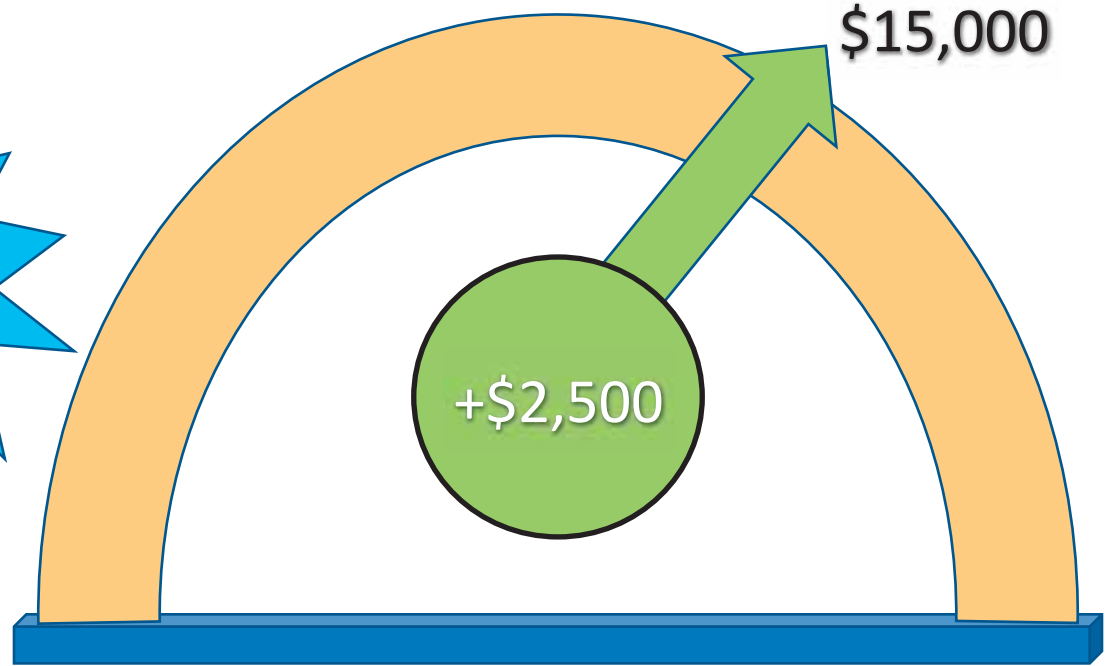
# What's The Value of a Chalice Membership?



# What's The Value of a Chalice Membership?



*Oak Street  
Origination  
Fee*



# What's The Value of a Chalice Membership?



*Succession Link  
Premier  
Membership*



**13X initial  
spend of  
\$1,500**

**\$15,850**





# What Advisors Are Saying



# Q&A

Sponsored By



Presented By



To view the slides and a recording of this webcast please visit:  
<http://www.fa-mag.com/ChaliceApril16>

For upcoming webcasts, please visit: <http://www.fa-mag.com/webcasts.html>  
Please send your questions, comments and feedback to: [dawn@fa-mag.com](mailto:dawn@fa-mag.com)

# Thank You!

Join Us Today at

[www.chalicefn.com](http://www.chalicefn.com)



STRENGTH OF **WE** EMPOWERS A NETWORK OF **ME**™