



# At Cambridge, We Deliver Solutions

**T**hirty years ago\*, Cambridge set out to partner with trusted advisors to offer what is best for their independent business and their clients. Our founder and chairman, Eric Schwartz acted with an inspired vision that led the industry-wide paradigm shift: the creation of a hybrid model to support freedom of choice and open architecture fee and commission platforms. Today, we continue on the same path. Our choices and solutions are based on achieving mutual success in an innovative, friendly, and truly independent environment.

#### **You control the journey.**

We have embraced this statement because we recognize that you need to chart a course that works best for you and your clients. We feel strongly about delivering the flexibility, choice, and innovative solutions you need to successfully run your independent business.

#### **The future of your business is our priority.**

Business continuity is one of the biggest challenges an advisor may face. We are focused on helping every

Cambridge advisor have, at minimum, a personalized, written emergency succession plan in place that is backed and funded by Cambridge. Our elite, cross departmental group has the insight and skills to offer unique, on-site support in the event of a challenge to business continuity. If an emergency arises, we will deploy our team to your business to assist in daily operations and service to your clients. We will be there when your clients and family need us most.

#### **Outsourcing made simple.**

In our industry, time is your most precious resource. Outsourcing has proven to be a way that you can spend more time with your clients and prospects – but finding the right third party who understands you and this industry can be challenging. Cambridge has embraced outsourcing and has developed in-house solutions collectively known as Cambridge Source. With solutions such as virtual assistant, website design, customized marketing, and social media, your time can once again be yours.

#### **Expand your retirement plan business.**

Client acquisition, plan design,

selling and servicing plans, and the changing regulatory space make the retirement sector extremely complex. Cambridge has created the Retirement Center and our Retirement Summit events to offer industry leading software tools, education, marketing, and practice management resources to help you identify the retirement plan business model that best matches the needs of your clients and business.

#### **Your ideas shape our future.**

We are proud that advisors who share our values of integrity, commitment, flexibility, and kindness choose Cambridge. Without the passion and dedication of our advisors, many of our solutions would never become a reality. By joining advisory boards, such as our New Century Council, and sharing their ideas, our advisors have shaped Cambridge and our solutions.

#### **Selective advisors choose Cambridge.**

We invite you to find out how we can help you meet the needs of your clients with our innovative solutions. Please contact us ([TheFeeExperts@cir2.com](mailto:TheFeeExperts@cir2.com)) at 877-4BD-4RIA (877-423-4742).

\*Cambridge and its predecessor Broker/Dealer.

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