



A Broker/Dealer Partner You Can Trust

Genuine Independence

As an advisor, your clients trust you with their dreams and goals, and you need a Broker/Dealer partner you can trust with yours. At Cambridge, we understand the importance of meeting your clients' needs while protecting your entrepreneurial freedom. With over a century of combined industry experience, our senior executive team shares the conviction that the independent model is the solution for the long term success of clients, advisors and the financial services industry.

Cambridge's commitment to remaining privately owned far exceeds the short term—we have spent 15 years consciously building a legal structure, business plan and a superior management team with the goal that success is not dependent on selling during their tenure with the firm, and well beyond that timeframe.

Challenges into Opportunities

Cambridge was forged from the belief that challenges are merely opportunities for innovation. We turned the

needs of our advisors into industry revolutionizing solutions that set the standard for pricing, flexibility and the fee-based model. We offer one of the largest footprints of financial products and services available and are committed to providing the highest level of flexibility and choice.

Known as **The Fee Experts**[®], we have been ranked a fee leader among independent Broker/Dealers for nine consecutive years¹ and are a five-time honoree in the Broker/Dealer of the Year annual poll.² We have successfully weathered the rise and fall of the financial services industry since our inception in 1981³ and continue to grow. With nearly \$33 billion in assets, Cambridge is ranked one of the top 20 independent Broker/Dealers by revenue.⁴

A Better Way of Doing Business

Typically when companies experience meteoric growth, the "family" culture that many tout is the first thing to suffer. Fortunately, Cambridge is anything but a typical company. With

a history of pursuing excellence instead of settling for the status quo, we continue to blaze the trail and exemplify how business should be done. Our core values of integrity, commitment, flexibility and kindness permeate every department of our company and drive our business.

Service Standards

At Cambridge, the facts speak for themselves. For the 11th consecutive year, we earned a 9 out of 10 rating on our annual Rep/Advisor satisfaction survey and over 90% of the survey respondents confirmed that we give them the choices and opportunities they need to meet their clients' goals without jeopardizing their best interests. In addition, we averaged 95% delivery of our internal and external BEST Service Standards, an accountability mechanism developed in-house across all departments that provides us with a quantifiable means of substantiating our reputation for excellent service—making us one of the few firms who can back up what we claim.

¹ *Financial Planning* magazine, June "FP50", Top 50 Independent Broker/Dealer Issue, 2001–2009

² *Investment Advisor* magazine, 2009, 2008, 2007, 2006, 2003

³ Cambridge and its predecessor Broker/Dealer

⁴ *Financial Planning* magazine, June "FP50", Top 50 Independent Broker/Dealer Issue, 2009

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