



# Personalized Service Beginning Day One

**U**NITED PLANNERS' Financial Services is a nationwide, full-service, independent Broker-Dealer that is uniquely structured as a Limited Partnership. This allows you, as a qualifying representative, to share in the firm's profits annually plus receive payouts up to 95% with no association fees. You will enjoy the advantages of working in a small Broker-Dealer atmosphere with personalized service beginning day one and continuing throughout your career.

Your experience with United Planners will be rewarding. You will feel like part of our family as you get to know the people you will work with on a daily basis. Your practice will benefit from those relationships and through our commitment to your success.

We provide the professional tools you need to run your practice in the most efficient and compliant manner. We also offer coaching programs, estate planning, investment and insurance specialists to help you accomplish your goals. In addition, we offer monthly conference calls covering topics such as: Maximizing Client Retention, Client Acquisition Programs, Successfully Handling Audits, Creative Sales Ideas, and more!

Our representatives also enjoy having access to Senior Management and the Partners Advisory Team (P.A.T.). Our P.A.T. is made up of six Partners in the field that serve overlapping terms and represent key issues which are important to your practice. They provide input to management and serve as a sounding board for new policies and procedures before they are implemented. This helps make United Planners' a very representative-friendly firm.

United Planners' also provides you the flexibility to have your own independent RIA, offering a choice of several custodians as well as many third party money managers. Another alternative would be to use our Firm RIA offering the same flexibility; however, United Planners' eliminates the paperwork burden by handling all the registration filings, ADV amendments and provides you with the client agreements.

We are proud of our reputation in the brokerage industry! We have serviced quality professionals over the past twenty years and look forward to the opportunity to talk with you about your practice. Let us be your personal, service-oriented Broker-Dealer. Call our Partner Development Department 800-966-8737 or visit [www.joinunitedplanners.com](http://www.joinunitedplanners.com) for more information.

We provide the professional tools you need to run your practice in the most efficient and compliant manner.

**CONTACT: Sheila Cuffari | United Planners Financial Services**  
 7333 E. Doubletree Ranch Rd., Suite #120, Scottsdale, AZ 85258 | 800.966.8737 | f 480.503.8183