COMMONWEALTH financial network®

A Place Where Your Advisory Practice Can Thrive

The premier advisory program with a payout that increases to as high as 95% as your managed assets rise.

HERE'S WHERE YOU'LL find our Preferred Portfolio Services® (PPS) platform, offering all the investment choices your clients demand. Where you're free to run your practice however you choose—with as much or as little assistance from us as you want. Where you can outsource the portfolio management or do it yourself. And where your payout increases to as high as 95% as your managed assets rise.

Choose Your Own Path to Success

If portfolio management is your focus, **take total control with PPS Custom.** You'll have access to a diverse selection of investment vehicles designed to meet varying client needs, including load-waived and no-load mutual funds, ETFs, individual equity and fixed income instruments, annuities, and alternative investments. And our **PPS Direct for Separately Managed Accounts program** offers a variety of options for high-net-worth clients. Manage your accounts on a discretionary basis, with or without the assistance of our model portfolios and recommended mutual fund list.

You can also **outsource to sub-advisors** to free yourself from day-to-day portfolio management. Our **PPS Direct Mutual Fund Wrap program** lets you outsource to us or another provider. There's also **PPS Select**, our turnkey program, with portfolios managed by our own Research team. Or opt to have strategic and tactical portfolio management provided through one of our third-party advisory partnerships.

With our **Retirement Plan Consulting** platform, you can successfully compete for a greater share of corporate retirement assets. And **Wealth Management Consulting** helps you position yourself as a wealth manager and charge retainer fees, flat project fees, or hourly fees—in addition to any asset-based portfolio management compensation—for the advice and time you give your clients. The **Commonwealth Alliance Program** puts you at the center of an entire wealth management team, reinforcing your role as your clients' principal financial advisor. And our **Advanced Planning team** coordinates our home office specialists to solve any problem—whether it's in the area of accumulation, retirement, estate planning, risk management, business planning, or taxation—and do whatever we can to help you move your business forward.

The Support You Need

Your advisory business is backed by all that Commonwealth has to offer. Including a personal coordinator and dedicated 30-person team to help make your transition a seamless one. A pioneering Practice Management program offering complimentary consulting on everything from strategic thinking to staffing to marketing. And technology that's built to help you take your practice where you want it to go.

A Partner Who Hasn't Skipped a Beat

Since 1979, Commonwealth has been an independent, privately held broker/dealer and RIA focused on the needs of independent-thinking advisors and their clients. Our business model offers stability, predictability, and cultural values that haven't changed with the times. We invite you to call to learn more—and start to experience an environment that's ideally suited to nurturing your own success.

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