WOODBURY FINANCIAL

YOUR KIND OF BROKER-DEALER.

Like you, we put people first

Woodbury Financial is a relationship-based broker-dealer that shares your people-first approach to financial planning and insurance solutions. We also understand that your needs are as unique as those of your clients.

From life insurance to guaranteed income to estate planning, we are uniquely positioned to support your business at every point on the wealth management spectrum.

Our flexible All Ways Open Architecture℠ gives you world-class tools, technology and systems that integrate seamlessly into your local practice. We maintain strategic alliances with our partner firms and thirdparty business resources. And our array of products is simply second to none.

Like you, we take a personal approach

And that means giving you individualized support. We believe in the importance of building relationships and take pride in connecting with our advisors on a personal level. Woodbury Financial's MVP service for top producers and state-of-the-art regionalized support model are unmatched in the industry.

Using this innovative approach, we've achieved true service excellence by developing strong relationships and providing quick turnaround times and better overall support.

Like you, we have high standards

These standards impact the way we conduct business on every level. Integrity is more than just adhering to compliance rules and regulations. It's about adopting an ethical attitude, which drives ethical behavior. By maintaining high standards and delivering customer service excellence, we're able to raise expectations beyond the reach of our competitors.

Like you, we value time

That's why we give you award-winning technology solutions that deliver a new level of efficiency with a personalized dashboard to get you where you need to go… fast. Advisor Portal is a dynamic, integrated website solution that will help you efficiently manage your daily business and service your clients.

Like you, we believe in loyalty

But we understand we need to earn it. First and foremost, we are committed to ensuring our advisors have the tools and support they need to continue doing what they do best – nurturing their clients. As a result, the satisfaction and loyalty of our advisors is our ultimate measure of success.

Like you, we're great at listening

We listen with the intent to understand rather than reply, so you've got our full attention. We realize that transitioning to a new broker-dealer is an important and complex decision. By working closely with you to understand your challenges and concerns, we will develop a successful transition plan tailored specifically for your needs.

With extensive experience, our Transition Team knows what you need to do before, during, and after the transition to keep your practice on track, which helps minimize downtime and lost compensation. Once you come on board, the support continues with training and assimilation calls from our team of experts.

Contact us today if you believe Woodbury Financial is "Your Kind of Broker-Dealer." You'll discover one-of-a-kind solutions created for financial entrepreneurs like you.

Member FINRA/SIPC and Registered Investment Advisor

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