

A Proud Member of AIG Advisor Group

First and foremost, Woodbury Financial Services is focused on advisors. Our people-first approach grows out of a passion for delivering the most powerful resources and the most advanced technologies so that you can do what you do best: build the savings and retirement funds of American families.

True Independence We pride ourselves in listening closely to our advisors to ensure that we make their definition of independence a reality. This means no sales quotas and the flexibility to access financial products from hundreds of companies.

Regional Sales Support One of our distinct features—and one of which we are most proud—is our support system of Regional Vice Presidents which work closely and intimately with advisors from the time they join us and then throughout their careers.

MVP Service Our top producers also receive proactive, priority service with access to MVP Support Consultants who deliver a myriad of exclusive benefits including service case work and research, paperwork assistance, and direct business tracking.

Award-Winning Technology Woodbury advisors have access to our award-winning technology solutions including the Advisor Portal which is a dynamic, integrated online system that is fully customized with your preferences and needs in mind.

Business Development Plot the roadmap of your future by developing a customized business plan with your Regional VP and then take advantage of premier coaching that is designed to help you double your business.

Complex Case Support Our Advanced Sales Team, consisting of experienced in-house attorneys, is a unique offering within the independent broker-dealer channel. This team will work closely with you on challenging situations and specific investment opportunities.

Seamless Transition Woodbury's experienced TransitionONE team knows what to do before, during and after the transition to keep your practice on track and immediately profitable while helping to minimize any downtime or lost compensation.

With an average tenure of 8.5 years and a 97% retention rate, Woodbury Financial has been serving advisors nationwide for nearly 50 years. We invite you to consider the many benefits of affiliating with our team.

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