

first allied

We are focused on collaborating with accomplished financial advisors who share our desire to grow their businesses.

As a full-service, independent broker/dealer, First Allied is a trusted partner in growth to about 900 of the most driven financial advisors throughout the nation. Founded in 1994, we have remained focused for nearly two decades on collaborating with accomplished financial advisors who share our desire to grow their businesses.

We focus on quality over quantity, and dedicate resources to enable personalized consulting that helps your unique business thrive. We believe in the power of differentiation and the need for world-class products and services, and are committed to investing in your continued development.

At First Allied, we place a high value on choice, and our independent advisors control how they choose to grow their businesses. We offer:

- Sophisticated investment management strategies and integrated wealth management solutions, including a Private Client Services offering for high-net-worth clients
- Continued development, including a Certified Wealth Strategist®



curriculum developed specifically for First Allied by the Cannon Financial Institute

- The assistance of a team of business consultants who can help you define your desired path, maximize efficiency, grow profitable revenues and develop a succession plan
- The help of advisory services specialists to assist you in establishing or expanding your fee-based business through cutting-edge technology and hands-on consulting
- Specialized support, available through teams of subject matter

experts in retirement services, insurance, investment management, marketing, wealth management, and more

- A marketing and client communications platform that includes tools to effectively brand your practice, streamline print and electronic marketing, facilitate web hosting, and customize marketing materials

If you are driven to reach new production levels while staying focused on your clients' best interests, let First Allied be your partner in success.