SagePoint Financial

SagePoint FINANCIAL

Take Your Business In A New Direction

Whether you are an independent practitioner looking for better operational assistance or a wirehouse veteran seeking more autonomy, SagePoint Financial can help you take your business where you want it to be, in precisely the way that works for you. We believe we've changed the paradigm of what you should expect from an independent broker-dealer, by transforming the way we lead into the way we listen. By transforming our customers into collaborators. And by transforming our 40 years of experience into know-how that works today – and works for you.

The resources you need, the service you deserve

While we offer you the resources that come with being a part of one of the largest networks of independent advisors in America, we're also driven to remain the most flexible, most nimble and most collaborative broker-dealer for your business. So whether it's offering adaptable solutions that easily conform to your idea of success, or providing evolving technologies that enable you to stay ahead of the curve, as the world changes, so do we. And so can you.

Business development solutions focused on your growth

From helping you road-map your future with a detailed business plan, to providing succession planning expertise that helps to protect and maximize the value of what you've worked hard to build, SagePoint takes an active role in supporting your long-term vision of success. In addition to the direct support of a Regional Vice President in a full range of endeavors geared toward meeting your specific goals for growth, you'll have access to comprehensive marketing and compliance resources, as well as coaching programs that are documented to help you increase your business.

Technology that works for you

At SagePoint, we are focused on enhancing your ability to run your business, your way. Our technology is no exception. From powerful, flexible resources that anticipate and address your needs, to a suite of advisory platforms that allows you to choose the right solution for you, we enable you to improve efficiencies across the board.

Affiliation options to meet your preferred partnership

Whether you choose to join us as an Independent Advisor, a Branch Advisor in an established SagePoint office, or a Registered Investment Advisor, our focus will be on providing you with the personal attention and resources you need to grow a thriving practice.

Transition expertise for the most seamless move possible

SagePoint has helped thousands of advisors successfully join us, using a four-stage transition process designed to streamline and simplify your steps, while minimizing any possible disruption to your business. From day one, you'll have the services of an experienced transition team, including a dedicated concierge, who will thoroughly plan your transition process according to your unique requirements, and stay with you every step of the way until your move is complete.

Let's talk

If you're ready for a relationship with a broker-dealer that is as committed to your success as you are, join SagePoint. And together, let's point your business in a whole new direction.Take the first step today by calling us at 866.462.4432 or visit SagePointFinancial.com.

SagePoint Financial, Member FINRA/SIPC and Registered Investment Advisor.

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