

We have a reputation for producing high-quality, high-performing and fast-growing practices within our industry.

As a full-service, independent broker/dealer, First Allied is a trusted partner in growth to about 800 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:

- A focus on growth as part of our culture. It's evident in who we hire to offer you support, the practice tools we build for you and it's carried through our leadership
- 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
- Pentameter™, an industry-leading practice management tool. It enables

advisors to identify and leverage resources within the First Allied platform at each stage of their practice's development

- Thought leaders and subject matter experts available to provide hands-on guidance in areas such as retirement services, insurance, investment management, wealth management and more

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.



Matthew Bassuk, Senior Managing Director, Business Development
655 W. Broadway, 11th Floor • San Diego, CA 92101 • 855.250.8761 • mbassuk@firstallied.com • www.joinfirstallied.com
First Allied Securities, Inc. - Member FINRA/SIPC