

A Proud Member of AIG Advisor Group

SagePoint has raised the bar when it comes to what you should expect from your broker-dealer. We do this by anticipating your unique needs and then by responding quickly. And we offer adaptable solutions that easily conform to the vision you have for your practice so that you are truly in charge.

Collaborative Approach We've transformed the way we lead...into the way we listen. Our approach with advisors is to see them as collaborators and we are constantly evolving so that as their world changes, so does ours.

Time-Saving Technology We deliver powerful, flexible resources that address your every need including offering a suite of advisory platforms that allow you to select your ideal solution which in turn improves efficiencies across the board.

Business Plan Development We have consultants in place to help you develop long-range plans that put you on the road to building personal wealth as well as a solid, transferable practice.

Affiliation Models We offer a wide range of affiliation options to ensure that you

are reaching your goals according to your own plan. Choose from our Independent, Branch, Employee and Registered Investment Advisor models.

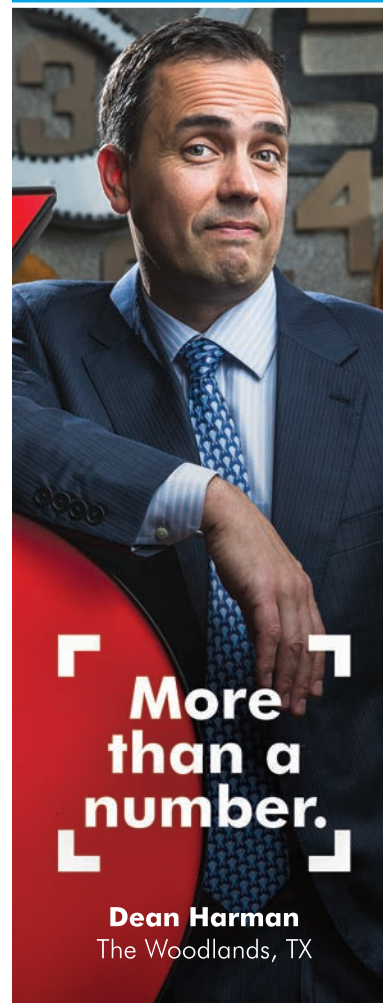
Common-Sense Compliance Our commitment extends beyond routine supervisory duties and branch exams to include a full suite of resources that enables you to rely on our expert team for much of your compliance and regulatory needs.

Office Automation Suite One of the great strengths of SagePoint is our Office Automation Suite that allows you and your staff to effortlessly streamline your office functions to become more efficient and profitable.

Succession Planning Working with our expert succession and continuity planning consultants, you can create a plan that will ensure that you are able to protect and benefit from the business into which you invested so many years.

With an average tenure of 10.7 years and a 98% retention rate, SagePoint Financial has been serving advisors nationwide for 45 years. We invite you to consider the many benefits of affiliating with our team.

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