

It Takes a Team

The Strength in Numbers

With increased regulatory pressures and the needs of investors becoming more complex, financial advisors are bolstering their teams.



The best financial advisors on Wall Street used to be lone rangers, who worked alone, did things their own way, made independent investing decisions and, after the firm got their cut, kept all the commissions they made on the client accounts for themselves. These days, things have changed and some of the most successful financial advisors in the industry are those who are part of a team. Teams tend to be more productive, both in terms of operating efficiencies and revenue generation. Recent studies show that investors are gravitating toward advisor teams and prefer working with a group of specialists that provide expertise in all areas of their financial plan.

Do you have insurance and estate planning professionals on your team?

Without specialists, advisors will struggle to fulfill the expanded fiduciary responsibilities brought on by the new DOL ruling.



Financial Advisor

- Wealth Management
- Relationship Management
- Practice Management

Specialist

- Insurance
- Estate Planning

Registered Client Service Associate

- Marketing
- Trading

Administrative Assistant

- Administration
- Operations
- Documentation

AimcoR Can Help: Your local AimcoR office can serve as the insurance specialists on your team. We function as wholesale practice management consultants for insurance and protection planning solutions. For information on AimcoR please contact 866.428.0108 or visit us at www.aimcorgroup.com