

Which Do You Prefer?

THE OLD SALES-CENTRIC MODEL

Investment Product
Providers

"Stock Brokers"
Salespeople
Product Distributors

You as the
Customer
"Buyer"

THE NEW CLIENT-CENTRIC MODEL

You as the Client
"Investor"

"Fee-Only"
Financial Advisors

Professional
Investment
Managers

Many investors turn to investment professionals for financial advice only to learn that the vast majority of Wall Street bankers and stock brokers are sales professionals who are compensated by their firms with sales commissions to sell proprietary investment products. There is a better way. Enlightened investors have learned to seek out fee-only advisors who are compensated by the clients for objective advice, and who do not earn any sales commission on the sale of investment securities. Typically, more objective sources of financial advice are found from fee-only financial advisors who work at registered investment advisory firms that are independent of the Wall Street banks and brokerage firms.

The client experience in the Client-Centric Model is the one where the client can have greater confidence that the advice provided by the advisor will be in the best interest of the investor.

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