

About Bridgemark

Bridgemark Strategies is an advisor centric consulting and recruiting firm. We work with advisors and advisory teams to help them evaluate their next transition. A transition is defined as changing broker-dealers, breaking away and starting or joining an RIA or selling or partnering your business.

As a part of our research we have talked to over 200 different solutions including Independent Broker-Dealers (B/Ds), Insurance B/Ds, Employee B/Ds, RIAs, OSJs, Custodians, Aggregators, Consolidators etc. to be able to understand their capabilities, strengths, weaknesses and key differentiating factors.

Our extensive research and decades of combined experience in conjunction with our unique process is what makes Bridgemark Strategies different in our ability to help advisors.

The Bridgemark Strategies Difference
Feel, Fit and Financials



Bridgemark Strategies has a unique personalized approach that focuses on three key criteria when assisting you to find the right solution: Feel, Fit and Financials

Our Services

 <h3>Broker/Dealer Search</h3> <p>Consulting Advisers Selecting a New Firm</p> <p>While switching firms can be time consuming and even costly, it is typically far more costly to not change firms. Let us help you realize your full potential.</p>	 <h3>Registered Investment Adviser (RIAs)</h3> <p>Selecting a Custodian</p> <p>If you are thinking about launching your own RIA or joining an existing RIA, there are many questions that arise. Let us help you navigate your options to select the right path.</p>	 <h3>Selling Practices</h3> <p>Strategies to Maximize Sales</p> <p>For every advisor looking to sell, we can help you understand your options, provide advice to improve valuation, and get you in touch with vetted buyers who are ready to make a deal.</p>
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Why Choose Us?

From changing Broker/Dealers or starting an RIA to building and executing a succession plan, merger or sale, Bridgemark's experienced recruiters and consultants provide comprehensive strategies, solutions, and guidance. Here are just a few reasons to choose us as your preferred financial advisor recruiters.

- ✔ Deep industry knowledge
- ✔ Extensive network of Broker/Dealers, RIAs and financial services firms
- ✔ 80+ years of experiences
- ✔ Committed to understanding your needs and goals
- ✔ Personalized coaching and consulting
- ✔ Informative, confidential and trustworthy

100+

Firms with selling agreements

200+

Firms Researched