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.

The Bridgemark Strategies Difference

FEEL
FIT
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

Solutions are customized for each advisor to help them evaluate and determine the right partner for their needs. When advisors are evaluating a transition of their business whether it's a change of B/Ds, becoming or joining an RIA, or selling or taking on a partner, advisors must identify and research different solutions. Most advisors not only don't know where to begin, but frequently they don't know how to compare firms either.

At Bridgemark Strategies, we work to understand your needs and goals as we help you find your individualized solution. When evaluating solutions, there are three key areas to research which can be summed up in three words: Feel, Fit and Financials.

FEEL
Culture | Philosophy | Personality

FIT
Business Alignment | Products | Client approach

FINANCIALS
Economic comparison | Upfront vs. Ongoing payout | True net payout