

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



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.



1 FEEL

Are you culturally and philosophically aligned? Does it feel right? We'll help you discover firms you can trust with like-minded people you enjoy working with.

2 FIT

Does the firm's products and services align with your goals? We'll work with you to uncover the firm with the right fit for your business needs.

3 FINANCIALS

Are you getting a fair deal? We can help you assess financial differences among firms and assist with negotiating final terms.