

THE BRIDGEMARK ADVANTAGE

CURATE. EVALUATE. NEGOTIATE.

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*Tailored, Unbiased
Support for
Financial Advisors*

EXPERIENCE.

Our team has **over 300 years** of combined experience in financial services. Former roles in leadership, recruiting, and strategy at the top independent BDs & custodians provides you with key insights across decision points.



150+ BDS & RIAS.

You benefit from the wide net of options that Bridgemark Strategies curates from.

ADVISOR-CENTRIC.

Your firm and your clients are unique to you. We approach everything with your goals in mind, working with you throughout the process.

The **first step** the consultants at Bridgemark Strategies make is to understand your goals.

Often, these solutions can straddle multiple different channels as we work with advisors to find their right solution.

The **second step** is the evaluation phase. We work with you to help you compare and contrast the different solutions. Unsupported advisors going through an evaluation get their information from the firm's hired recruiters. Having a tenured, nonbiased, **Bridgemark consultant** helping you evaluate firms with neutrality, as well as provides the insights to minimize misunderstandings which can be costly.

The **final step** is the negotiation. Our team helps hundreds of advisors per year across dozens of different firms. This gives us a proprietary knowledge around deals, economics and opportunities for negotiations which we use to benefit you.