Alliance
Wealth Management Group
Investments | Tax | Financial Planning

Built by CPAs for CPAs

CPAs Make Exceptional Financial Advisors

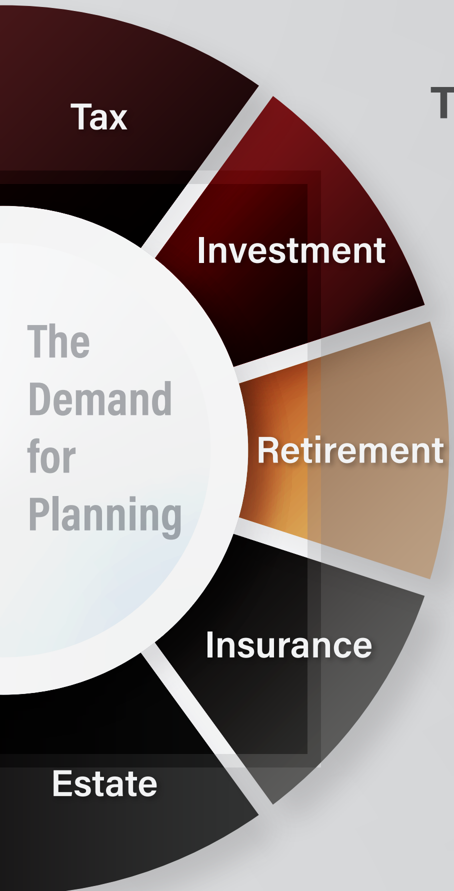
Increase Your Present Value

Add premiere wealth management services to your existing practice.

What the AICPA is Saying About Personal Financial Planning

Client needs are changing, and there is an increasing demand for experts capable of providing objective advice to individuals, families and business owners on complex financial situations.

Those who have historically provided only tax planning and compliance services for individuals can initiate the change for themselves and their clients by evolving their offerings to include an integrated services approach.



The Economic Benefit of the CPA as a Primary Point of Contact or Hyper-Specialist

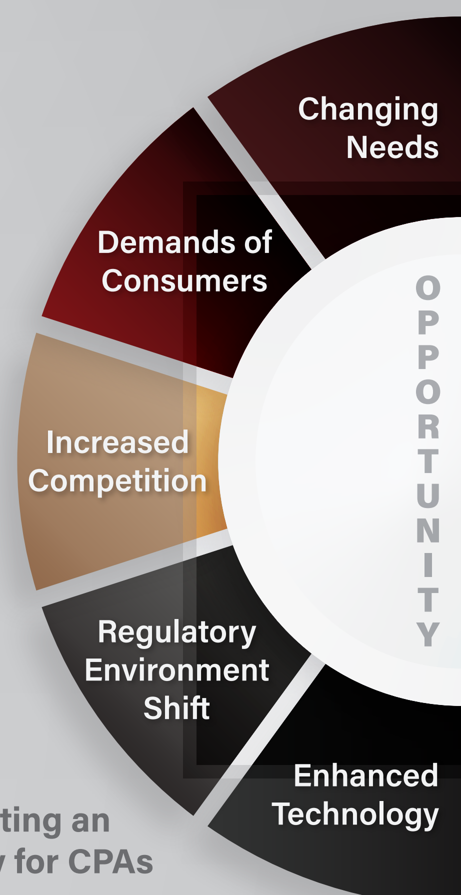
- Higher client retention
- Increased revenue and profitability
- Ability to attract new and retain current clients
- Increased value of firm when it comes to succession planning

63% Reported increases in new clients

25% Reported increases in client referrals

79% Reported profitability in the first year

53% Reported increases in professional referrals from other advisors



External factors are creating an opportunity for CPAs

For the complete Roadmap to developing a planning & tax advisory business visit the AICPA's website

There's Never Been a Greater Demand for Personal Financial Planning Services

It's Happening...

10,000 Baby Boomers will turn 65 every day for the next 10 years

$30 Trillion In wealth will transfer over the next 20 years.

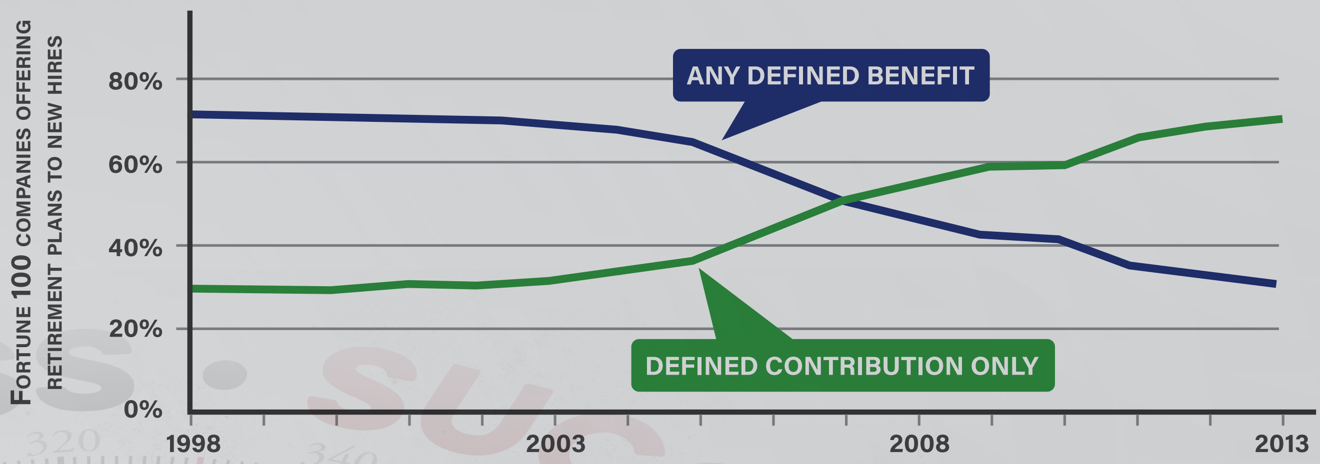
15% Growth In demand for personal financial advisors projected.

Baby Boomers are expected to have **70%** of all U.S. disposable income over the next five years.

The demand for planning & advisory services is growing three times faster than tax preparation services alone. *

* IBIS World

A Shift to Defined Contribution Plans



Source: Towers Watson

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BIPARTISAN POLICY CENTER

It's Time for You to Take Action

- You are considered the most trusted advisor.
- The days of accountants merely ensuring compliance and doing taxes once a year are surely coming to an end.
- Your background and expertise are the cornerstone of financial planning.
- Clients seek trusted advisors every day of the year in every aspect of their financial present and future.
- We've done the hard part. The time and opportunity are now.

A Comprehensive Platform for your Success

Increase Your Present Value

COMPLIANCE

We do the heavy lifting for you.

Resources and expertise to ensure full compliance with SEC and FINRA regulations.

ONGOING TRAINING AND SUPPORT

Comprehensive package of resources.

Mentoring and training.

As our partner, a dedicated team member will be assigned to you for the duration of our partnership.

TECHNOLOGY

A technology package containing investment, financial planning, CRM tools and more.

Resources to maximize communication.

Technology solutions that continually evovle to support our platform.

Balancing the personal relationship and the insights of an experienced advisor with emerging artificial intelligence trends.

BUSINESS DEVELOPMENT AND MARKETING

Increase communication with your existing clients.

Expand networking and relationship building opportunities.

Align your vision and mission with your clients' expectations.

Create new business opportunities.

PREFERRED ACCESS

Preferred access to industry leading custodians for independent advisors.

Premier level of support.

charles SCHWAB

TD Ameritrade

Keep Your Independence

The Alliance Wealth Management Advantage
Built by CPAs for CPAs

Alliance Wealth Management Group is your bridge to greater success. We offer a partnership that enables you to keep your identity while expanding your services, increase long-term, successful relationships with your clients and maximize your revenue stream.

Our synergistic, ongoing team approach is our powerful differentiator in the marketplace.

We have done it already...
Follow our lead... You can do it too!

We spent years researching, creating and implementing this platform.

It's intelligently simple
It's innovative
It's successful
It's proven

AWMG currently manages more than $225 million of investments for our clients

What's in it for You?

Alliance Wealth Management Group is a resource to give CPAs the confidence and tools necessary to provide investment management services.

- **An exceptional experience for you and your clients.**
- **A business model that aligns with your values.**
- **A partnership that allows you to keep your independence.**
- **More predictable and diversified revenue throughout the year.**
- **Increase your long-term, successful relationships with your clients.**
- **Spend more time on the things you want to do.**

Alliance

Wealth Management Group

Investments | Tax | Financial Planning

This is Your Future...

You've thought about it. You know forming strategic alliances will help your business grow. But like so many of your colleagues, you probably haven't figured out how to get the ball rolling. The time is now. We are committed and ready to invest in you.

Are you ready to...

- **Experience higher client retention?**
- **Increase your revenue and profitability?**
- **Attract new and retain current clients?**
- **Increase the value of your firm when it comes to succession planning?**

And...

- **Maintain your independence!**

Alliance Wealth Management Group

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