



# Thinking of **Making a Move?**

CLAIM YOUR **I N D E P E N D E N C E**

Going independent doesn't mean you have to go it alone. In fact, many financial advisors opt to join an established RIA firm instead of taking on the challenges associated with setting up and running their own independent practice.

**When you work for an RIA firm, you're able to leverage that firm's existing infrastructure, resources, processes, and even brand power to hit the ground running right away.**

## Benefits of the move

Advisors are universally happy with their decision to move, **citing both emotional and economic benefits.**

**96%** Advisors happy with their decision to move

**82%** Average percent of clients that advisor wanted to move to their new firm

**78%** Average percent of clients that made the move to the new firm

**83%** Percent of advisors who reported an increase in AUM since switching firms

**30%** Median increase in AUM since switching firms

**28%** of movers said none of their initial concerns ended up being a significant issue

**36%** of movers said they should have made the move sooner

**41%** of time spent on transition instead of managing practice

**6mo.** Average time it takes to fully transition to their new firm

## Reflections on the move

Advisors' initial concerns do not often come to fruition, and **over a third said they should have made the move sooner.**