



PALISADES PARTNERS

PALISADES PARTNERS BROKERAGE

The turnkey business platform for financial advisors to make more money and build their books - without the stress and overhead.

THE OPPORTUNITY

THE STANDARD BUSINESS MODEL FOR FINANCIAL ADVISORS IS BROKEN. WE'VE FIXED IT.

The promise of an advisor career is an alluring one.... High income, a great lifestyle and plenty of free time. Unfortunately, the reality is far different, as **most advisors spend too much time on menial and disruptive tasks that don't make them money.**

The simple truth is that today's financial advisors are overworked, under-compensated and constantly stressed. Those who do make a lot of money must sacrifice their lives, spending their nights and weekends in the office - instead of out in the world with their families and friends.

Clearly, something has to change. There must be a better way - a path to achieving high income and personal freedom, without the stress, overwhelm and chaos.

This deck will show you the path forward.

THE CHALLENGE

YOUR GOAL IS TO BUILD YOUR BOOK.
SO WHY DON'T YOU EVER SEEM TO
HAVE ENOUGH TIME TO DO IT?

1

YOU HAVE TOO MANY RESPONSIBILITIES

Most businesses have support staff. But you have to do it all. From marketing and support to client management and case design, there simply isn't enough time for you to build your book.

2

YOU HAVE TO BE AN EXPERT IN EVERYTHING

Clients want a plan customized to their needs. But doing so means you need to be an expert in insurance, investing, finance, tax law and business planning.

3

YOU'RE BURIED IN PAPERWORK

Everything has a paper trail. Client accounts, compliance, marketing materials... the list never ends. And by the time you clear one pile off your desk, two more have taken its place.

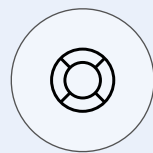
4

YOU DON'T GET BACK OFFICE SUPPORT

Even if you manage to do everything else, you still have to manage staff, overhead and compliance.

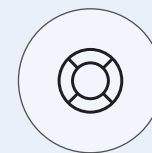
THE PROBLEM

WITH SO MUCH TO DO, CATCHING UP CAN FEEL IMPOSSIBLE.



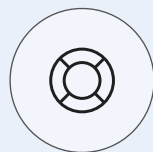
YOUR DAY IS FILLED WITH INTERRUPTIONS

Clients will always have needs. But when they're constantly calling you, it takes you away from your most valuable activities, disrupts your flow and costs you time.



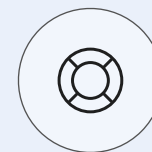
YOU'RE STRESSED AND OVERWHELMED

These constant disruptions are like arrows being fired at you. Many advisors find that, even during their down time, they're stressed about what's coming at them next.



YOU'RE CONSTANTLY IN "REACT" MODE

The constant disruptions force you to be reactive, not proactive. As a result, it's difficult to find both the time and mental energy to focus on your core business.



YOUR DAY IS DERAILED BEFORE IT EVEN BEGINS

The end result is that, no matter how hard you work, you never seem to catch up. Instead of being in a natural flow, every day seems like an exercise in putting out fires.

WHERE DO ADVISORS SPEND THEIR TIME?

Most advisors spend a lot of time doing a lot of things that don't make a lot of money. Would you be surprised to learn where you're spending the most time?

* Based on a 40-hour week





THE SOLUTION

THE PALISADES PARTNERS ADVISOR PLATFORM

A TURNKEY BUSINESS
MODEL BUILT FOR
TODAY'S ADVISORS

A BUSINESS DESIGNED TO GIVE YOU EVERYTHING YOU NEED.

WE'VE GIVEN THE POWER BACK TO THE ADVISORS.

Palisades Partners has changed the game forever. Our Advisor Services Platform is a turnkey model which provides you with the resources, expertise, client support and back office to manage your business, so you can focus on closing clients and building your book.

A BUSINESS PLATFORM BUILT SPECIFICALLY FOR YOU.

Our mission is simple: to help you make more money, in less time and with less stress. We handle all of the things that cost you time and peace of mind, so you can reclaim your business – and your life.



WE BUILT EVERYTHING, SO YOU DON'T HAVE TO.



CLIENT ATTRACTION

Marketing is a full-time job. So we provide you with a full suite of resources for lead generation, social media promotion and personalized relationship management to attract, qualify and close your ideal clients.



CLIENT SERVICE

Get your time back – and let us handle the disruptions. Our team will respond to client requests, streamline your CRM, free you from endless piles of paperwork and put everything you need at your fingertips.



CLIENT ENGAGEMENT

You'll no longer have to spend hours on research, case design and modeling. We give you turnkey tools & models for providing customized insurance, financial, tax and business planning.



BACK OFFICE

Free yourself from the administrative headaches of running your business. We handle your back office and manage your staff, so you can focus on building your book and making more money.



“I can finally **make more money**
with less time - and less stress!”

DANIEL ROSBERG

PALISADES PARTNERS: TURNKEY SERVICES



CARING ADVISOR PROGRAM

Human-touch relationship management to ensure top-of-mind awareness for your clients.



DIGITAL PRESENCE PROGRAM

Turnkey website, social media & content marketing packages for online lead generation.



DIGITAL OUTREACH PROGRAM

Our complete social media marketing program for streamlined client outreach attraction.



RESPONSIVE ADVISOR PROGRAM

Outsource your responsive service requests without losing control of your client relationships.



ADVISOR FIRST PROGRAM

Let us handle applications & paperwork, so your clients see you as their trusted advisor.



FIRST IMPRESSIONS SUITE

Palisades Partners Certified Staff to provide a connected experience for office-based clients.



ADVANCED POINT-OF-SALE

In-house, point-of-sale assistance by a certified JD or LLM... need more info on this one.



INSURANCE CASE DESIGN

Provide the perfect client-to-product matches with our turnkey case design system.

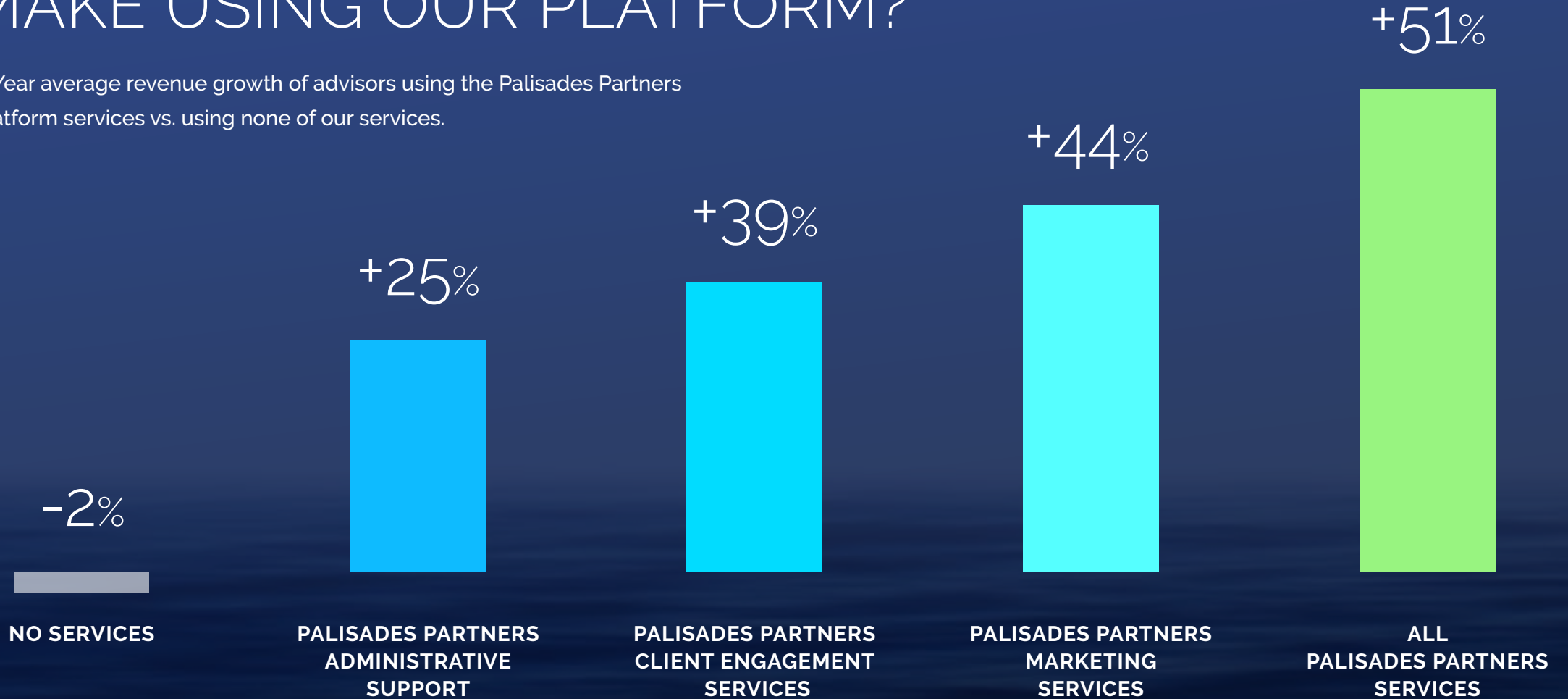


FINANCIAL PLANNING UNIT

A streamlined platform for building a customized plan tailored to the needs of each client.

HOW MUCH DO ADVISORS MAKE USING OUR PLATFORM?

5-Year average revenue growth of advisors using the Palisades Partners platform services vs. using none of our services.



OWNERSHIP HAS ITS BENEFITS

When you join Palisades Partners,
you'll not only have a better
business, you'll have a better life.

MAKE MORE MONEY

Palisades Partners helps our **advisors bring in more revenue**.
It's that simple. Our turnkey tools & services give you the path
to generating real income – without the added stress.

BUILD A REAL BOOK OF BUSINESS

Finally, you'll be able to build to a true, **sustainable business that you own**.
Our platform enables you to do what you've always wanted: generate
recurring revenues by selling the best products to the best clients.

|

RECAPTURE YOUR TIME

Freed from your daily disruptions, you'll finally be able to spend your time making money for your business and **enjoying your life outside of it.**

|

REGAIN YOUR PEACE OF MIND

More time and less stress brings what we all want - a better quality of life for ourselves and those around us. After all, isn't this why we got into the business in the first place?





“After years of questioning my career choice, I finally have peace of mind.”

DAVID HAMILTON: : CLU[®], ChFC[®], ChSNC[™]



THE FUTURE IS BRIGHT.

YOUR BUSINESS. THE WAY IT SHOULD BE.

Working longer and harder isn't the path to success. Instead, the key is to find a partner who lets you work smarter - without giving up your entire life.

Come talk to us, and see how it really is possible to build your book, make more money and recapture your life... all at the same time.