



*By eliminating institutional politics and profit margins, independent financial advisors can produce **significant** savings for their clients and **substantially** higher incomes for themselves.*

In a widespread industry movement, today's uncompromising financial professionals are fleeing from banks and brokerage firms that relentlessly push their corporate profit agenda ahead of the client's.

While many consider a transition to independence, the most experienced have the option to rise above the traditional sales rep and become Fee-Only Advisors. No more broker dealers, production quotas or pay-out grids. No fine-print disclosure of conflicts. No "hybrid" flavors of objectivity.

The Mellons and Rockefellers *didn't* invest with an institution. They hired the best talent they could find, created their own Financial Team, and paid them a fee to represent the family's best interests.

Veteran financial advisors whose knowledge and experience command a respectable fee don't need sales licenses or broker-dealers. Their knowledge, skills and experience are very valuable to wealthy clientele. And, without being handcuffed by an institutional profit agenda, they can produce *significant* savings for their clients and a *substantially* higher income for themselves.

FirsTrust has been nationally recognized as one of America's elite wealth management firms, and proudly claims the title of True Fiduciary by delivering objective, fee-paid investment management, financial planning, tax and estate planning services to affluent clientele for nearly 20 years.

We are currently seeking competent, like-minded professionals to join our **Daytona Beach, FL** and **Atlanta, GA** Financial Teams; with all the corporate, regulatory and operational infrastructures already in place to help you move from "working" a job to "owning" your business.

Locations



FirsTrust Corporate Offices
113 Executive Cir., Daytona Beach, FL 32114

FirsTrust - Executive Offices
3340 Peachtree Rd. NE, #580, Atlanta, GA 30326

FirsTrust - Boca Raton
2385 Executive Ctr Dr., Boca Raton, FL 33431

FirsTrust - Orlando
121 S. Orange Ave., Orlando, FL 32801

FirsTrust - Tampa
3030 S. Rocky Point Dr., Tampa, FL 33607

Company Information



Firm Type: Fee-Only Financial Teams of Investment Managers, Financial Advisors, Tax Consultants, and Trust & Estate planners

Total Staff: 6 advisors; 6 admin; 2 busn. devlpmt

Years in Business: 20

Compensation Model: Recurring client fees

Broker Dealer: RIA Only - no BD needed

Primary Custodian/Clearing: We have multi-custodial consolidation & reporting capabilities

Custodians Used: TD Ameritrade, Fidelity, Pershing, Schwab.. we can use multiple custodians.

Contact Information

Michael T. Koenig - Managing Partner
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1-800-585-9888

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Bill@FinancialTeam.com
1-800-585-9888

Visit our website at www.FinancialTeam.com

Best Match

Veteran investment advisor, financial planner, tax consultant or trust & estate planner with loyal client relationships; wants to join a team of high caliber professionals for collaboration, admin & operational support and the freedom to truly serve the client's best interests.

Required Skills:

College degree + Industry Designations
Min. 10+ years of client-facing experience

Minimum Production Required:
We do not have "production quotas"

Minimum AUM:
Best suited advisor will have some portable High Net Worth clients.

Advisor Compensation:
Custom-designed per Candidate

Equity Potential?:
Yes