

Ideal Partner

Owner Looking to:

-Step away in 2-4 years
or sooner

-Slow down

-Have more free time

Deep relationships with your clients

Have not optimized formal
succession plan for you and your
clients

Ideal Custodian Partners:



Small RIA Firm

If you checked 3+ boxes above, let's chat...

to discuss a potential partnership that would give you confidence your clients will be well-taken care when you decide to slow down and then eventually walk away.

Why Antolino Financial Companies?

- Experience:** We've successfully acquired 3 other advisory firms in the past 5 years.
- Growth Trajectory Incentive:** 20%+ growth year over year for last 5 years; grow with us and be rewarded accordingly.
- Time:** Have the confidence to spend more time with family, vacationing, pursuing activities and other life goals outside of work by being unshackled of the day-to-day operations of the business.
- Systems:** We have developed systems and processes like The UltraVision System®, The ABC's of Cash Flow™ and other proprietary processes that separate us from our competitors that will benefit *your* clients.
- Multi-generational Ownership:** we have ownership spread out over 4 decades and are built to be around for the next 50+ years.
- Caring Deeply:** We have a culture of caring deeply about a few, great people: our clients and our employees. We will extend this culture of caring to our partners' client relationships to give you confidence they will get a service experience that will exceed expectations.
- Investment Strategies:** Our Investment Committee is equipped to learn and incorporate your existing strategies to continue offering your clients the same strategy after a transition.
- The UltraVision System®:** Our time-tested, proven financial planning process sets us apart from other advisors.

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Investment advisory services offered through AA Financial Advisors, LLC.