

edge
PARTNERS

ADVISOR PIPELINE PRO

The ultimate inorganic growth engine for RIAs.

EDGE PARTNERS OVERVIEW



WHO WE ARE

RIA GROWTH EXPERTS

We are an active partner in driving growth and valuation for wealth management firms. Leveraging 15 years of expertise, we have facilitated the movement of billions of dollars in assets to support our partners' growth.

We identify firms exhibiting growth potential, then partner with them to execute their vision through **organic and inorganic strategies**.

OUR STRATEGIES

INORGANIC GROWTH

We impact valuation through four key growth levers:

1. **Multiple Expansion:** We focus on the key characteristics of your business that will drive valuation multiples.
2. **Revenue Growth:** We seek quick wins and longer-term strategic opportunities to grow top-line revenue.
3. **Margin Growth:** In collaboration with your team, we assess, identify, and recommend improvements to key cost centers to improve bottom-line results.
4. **Recruiting & M&A:** We implement Advisor Pipeline Pro, a proven inorganic growth strategy designed to accelerate expansion.

ADDITIONAL RESOURCES

EXPERTS IN SCALING RIAs

We've combined years of growth-driving experience with advanced technology and personalized outreach to enable RIAs to reach, engage, and close deals more efficiently than ever before.



LEADERSHIP CONSULTING

We can help you design and implement a growth plan that aligns with your vision and goals. We can help you assess your strengths and weaknesses, identify the best opportunities for expansion, and craft a compelling offer for potential advisors.



MARKETING & BRANDING

Communicate your value proposition and differentiate your firm from the competition. Our marketing team has extensive experience in creating and executing effective RIA marketing campaigns from brand development, content generation, distribution, and PR.



BUSINESS DEVELOPMENT

Master the skills and techniques to convert prospects into clients. We can help you build rapport, overcome objections, negotiate terms, and close deals with confidence and professionalism.



M&A DEAL ADVISORY

Navigate the complex and dynamic landscape of RIA mergers and acquisitions. We have a team of experienced advisors who have successfully facilitated various types of transactions, from tuck-ins to full-scale acquisitions. We can help you evaluate opportunities, structure deals, and manage due diligence.



TRANSITION MANAGEMENT

Ensure a smooth and seamless transition for your business, the advisors you acquire, and their clients. We have a team of skilled project managers who can handle all the details, from deal signing to post-transition integration.

ADVISOR PIPELINE PRO OFFERING



RECRUITING & M&A

ADVISOR PIPELINE PRO

Discover the potential for unprecedented growth.

Advisor Pipeline Pro is an all-in-one growth solution for RIAs looking to establish an ongoing pipeline of advisor recruitment candidates and M&A deal opportunities.

Developed in-house, Advisor Pipeline Pro combines technology with personalized outreach, proprietary segmentation, and comprehensive deal pipeline management expertly led by the Edge team.


The outcome? A continuous flow of qualified engagement with like-minded recruitment candidates and viable deal opportunities.

ALL-IN-ONE SOLUTION

THE DEAL PIPELINE ESSENTIALS

1 LEVERAGE TECHNOLOGY

Our tech environment tracks advisor activity, automates outreach, identifies critical contact information, and manages your pipeline.



2 TARGET CONTACTS

With our proprietary segmentation process, we give you exclusive access to accurate advisor data in your target geography.



3 OUTREACH STRATEGY

Automated and optimized, our outreach process is designed to begin the conversation and build relationships with your target advisors.



4 CONSULTATIVE APPROACH

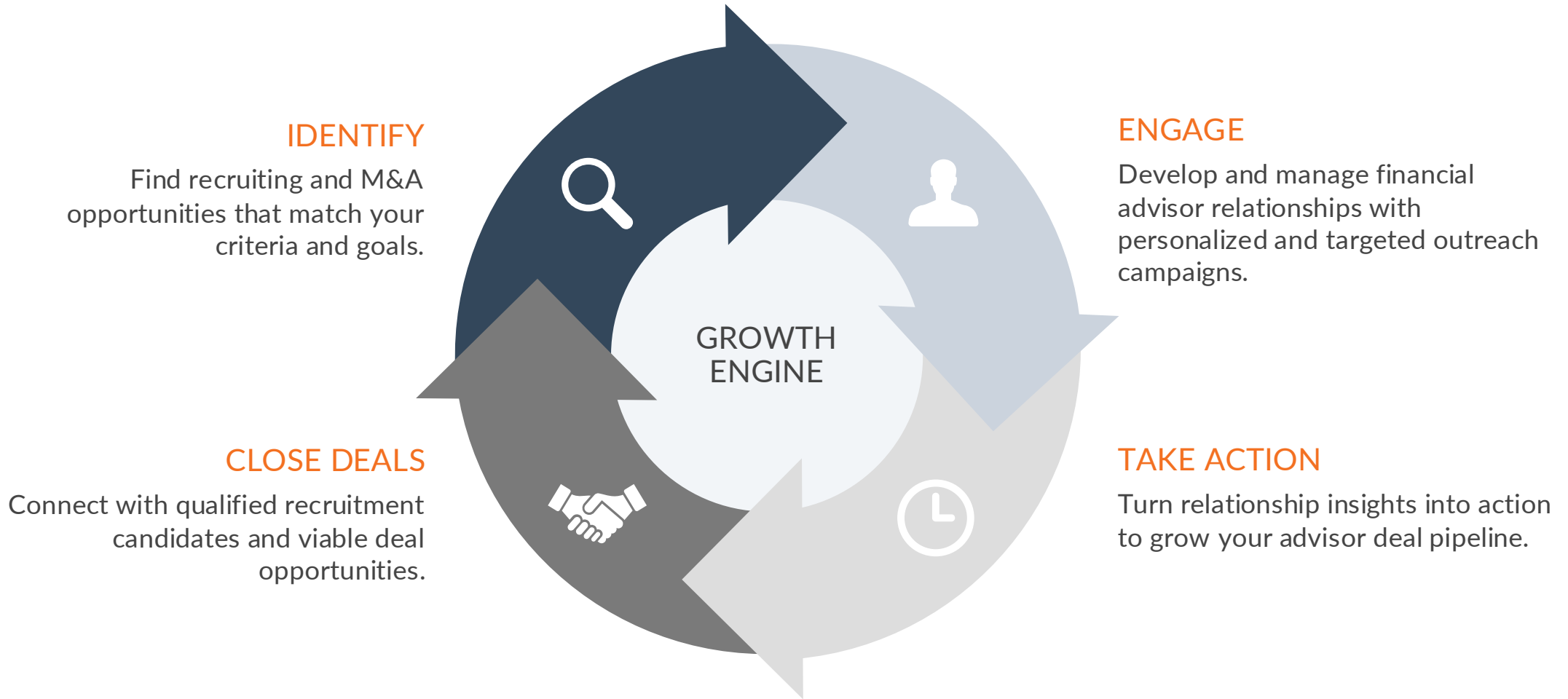
We work with you to improve your success leveraging our inorganic growth experience and expertise in the independent wealth space.



ADVISOR PIPELINE PRO

HOW IT WORKS

It's a pre-built pipeline designed to start conversations with qualified targets in your geography.



TARGET CONTACTS

ENGAGE THE RIGHT ADVISORS

Whether you seek acquisitions, tuck-ins, succession, mergers, or other opportunities.

OPPORTUNITY PROFILE



Deal Type: M&A
AUM: \$120,000,000.00
Segment: Succession
Type: IBD
Geography: State/Region

PERSONAL CONTACT INFORMATION

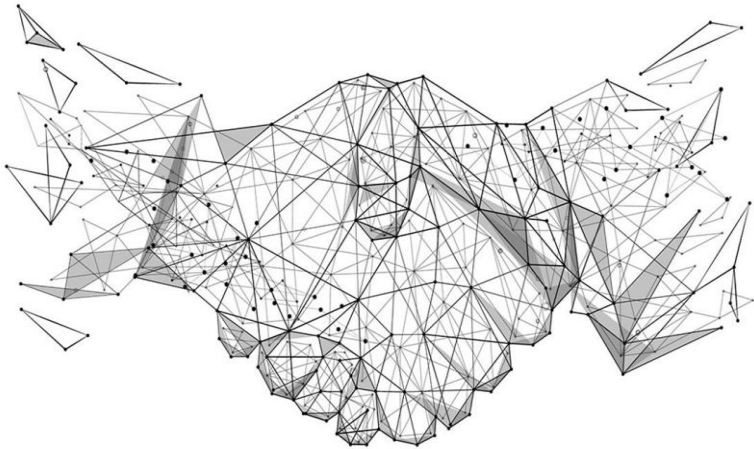
Full Name	 Phone
Title: Founder, CEO	+123-456-7890
Age: 65	 Email
LinkedIn Profile	name@domain.com
	 Address
	123 street, city and state.

- **Dominate your market with exclusive access:** We work with one select RIA / Wealth Team per geography, providing an exclusive competitive edge
- **Target the right advisors with expert segmentation:** We conduct thorough research and segmentation of contacts in your market by utilizing proprietary categories and over 100 parameters to identify the best prospects for your goals.
- **Connect with advisors using accurate data:** We provide best-available contact information sourced from multiple data sources for each target. LinkedIn profiles, work / personal emails, and work / mobile numbers. This enables crafting personalized messages and effective follow-ups.
- **Get an ideal list of target advisors:** Our process filters advisors that are in your market down to a select list of targets which match your criteria and goals. We seek to target approximately 250 qualified advisors for each engagement.

OUTREACH STRATEGY

GENERATE DIALOGUE

Begin the conversation and build relationships with your targets.

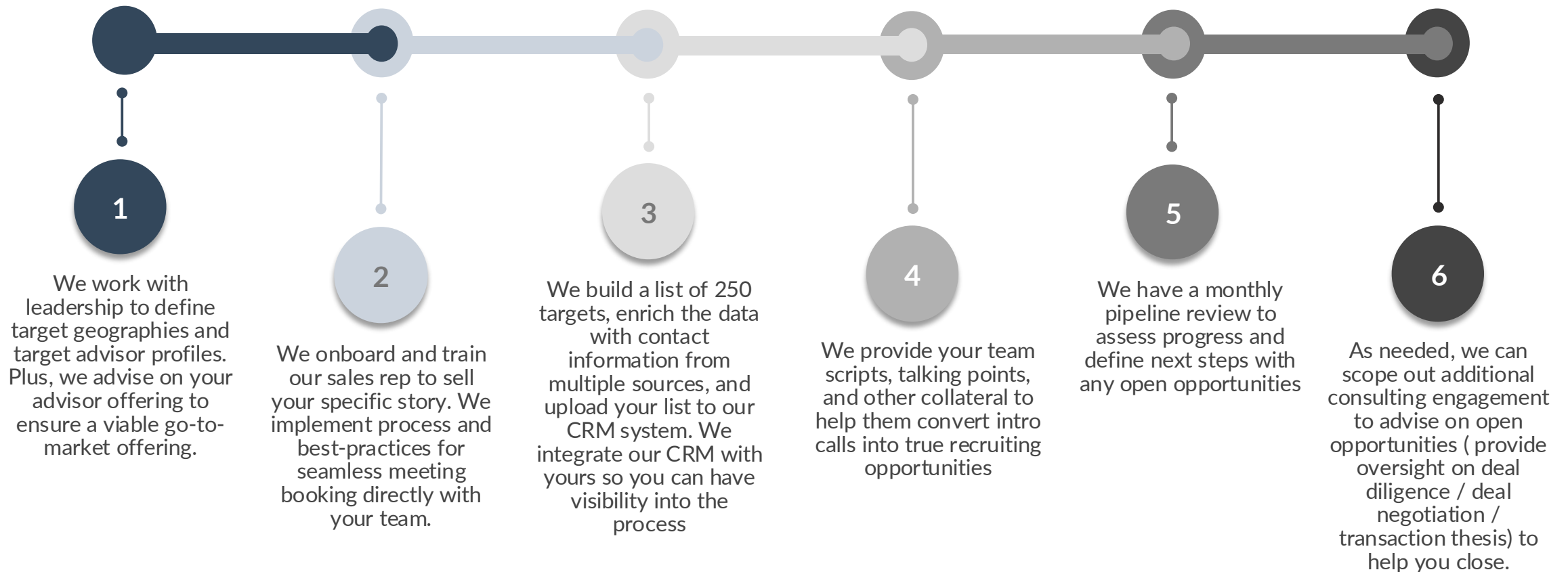


- **Dedicated business development rep to generate qualified conversations:** Our team engages your targets via email, text, phone, and LinkedIn messages. Your team will get qualified meetings as a result of this outreach.
- **Nurture relationships:** We position your firm as the ideal destination for advisors. We share a story that showcases your expertise and vision.
- **Optimize your outreach with clear calls to action:** We provide your team with phone scripts, email templates, and tips to convert intro conversations into tangible opportunities.
- **Track your pipeline and opportunities:** We monitor the progress and performance of your campaign and collaboratively review your pipeline with you on a monthly basis.
- **Analyze your engagement dashboard report:** Get insights into your advisors' behavior and interests. See how they interact with your messages and content.

CONSULTATIVE APPROACH

FULLY GUIDED PROCESS

Our comprehensive support ensures a seamless experience from strategy development, onboarding, training, and ongoing management.



PRICING

ADVISOR PIPELINE PRO

ADVISOR PIPELINE PRO

\$5,000 / MONTH

- A targeted list of ~250 advisors within your specific geography fitting your desired advisor profile
- Segmented and enriched contact information for each target which you can keep forever
- Dedicated Business Development Rep making 300+ points of contact / month and booking meetings directly with your team
- Sales collateral and targeted advice to help you convert intro calls into tangible opportunities
- Monthly Pipeline Review to assess progress and advise on next steps

30-day setup timeline

6-month commitment required

CASE STUDY

ADVISOR PIPELINE PRO

PARTNER CASE STUDY

San Diego-based HNW RIA

Partner's Objective: Acquire talented HNW-focused advisors with HNW assets.

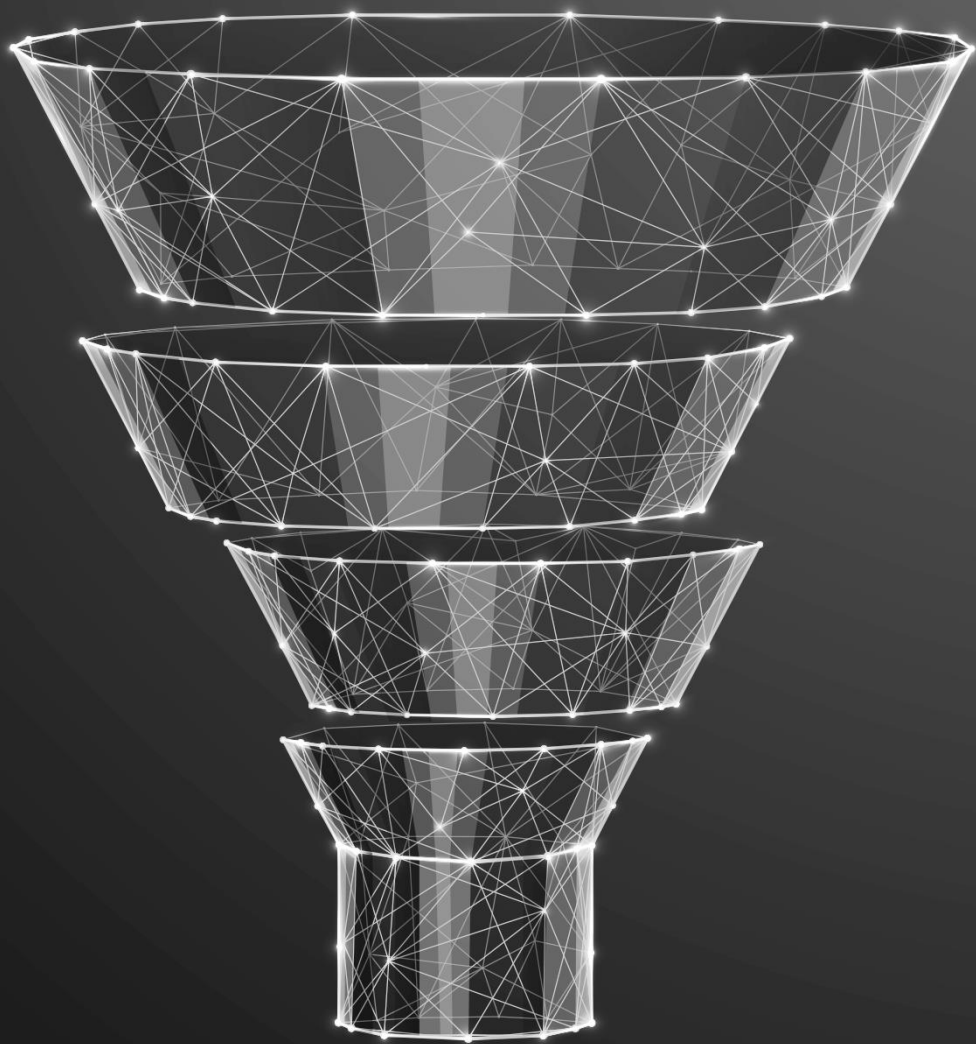
Our Process: We identified 663 potential target advisors in a specific market geography. Each advisor was segmented to identify qualified targets for outreach. We then validated that the correct contact information was documented.

In parallel, we tailored an advisor offering that aligned with our target advisor profile and created an acquisition model that aligned with the firm's growth strategy.

With a targeted list, contact data, and a branded offering, we launched our go-to-market strategy.

Partner's Results: In 6 months, we targeted 174 qualified advisors, resulting in 10 relationships, 5 opportunities, and successfully closed 2 advisors.





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YOU'VE HEARD FROM US

WE WANT TO HEAR FROM
YOU.

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 [Connect on LinkedIn](#)