



Partnership Opportunity



Presented by
AdvisorBridge

A Unique Opportunity to Partner with a Unique Firm

Our client is a Calgary based ICPM and Multi Family Office, registered with the ASC and BCSC. This firm has been created to serve ultra high net worth clients with an offering which is bespoke down to every last detail. Their full service model includes in-house lawyers, accountants, investment professionals, family governance, relationship coaching and support staff to offer a concierge style services to families.

Create a Customized Client Experience

- In-house professionals to address complex problems
- Sophisticated institutional investment solutions
- Custom client reporting designed HNW clients
- Multiple custodial relationships
- Consolidated reporting and risk analytics
- Access to equities, bonds, options, futures, swaps, hedge funds and private equity funds

The Partnership

Our client is offering you the opportunity to partner with their firm and leverage their infrastructure, relationships and networks they have built to create your own independently branded firm supported by their platform.

Working out of your own distinct location you will operate with complete autonomy, supported on a robust, entrepreneurial foundation.

Our client is offering you a unique opportunity to build a fully independent boutique while offering affluent clients the total wealth management experience they have come to expect. This level of freedom is balanced by business friendly compliance and an environment that is intended to foster growth and entrepreneurship.

The Candidate

You are a successful portfolio management team interested in creating a highly differentiated, independently branded firm. You work with HNW clients whose evolving needs demand solutions to complex legal, tax planning and significant life events. You are an entrepreneur who values an environment free of bureaucracy, a large compliance footprint and multiple layers of management.

If you are interested in this turnkey solution to creating an independently branded firm for your HNW clientele, please contact AdvisorBridge.