ROCKPORT WEALTH ADVISORS

At Rockport Wealth, we have a simple vision, we are building a community of likeminded advisors who are seeking to grow and collaborate as we help our clients achieve their financial goals. We envision true independence, transparency and efficiency. Eliminating unnecessary expenses, reducing complexity and ultimately growing with greater confidence.

As we see it, many advisors have an idea of where they want their businesses to be, but they do not really understand how to get there. They become intimidated by the thought of creating an RIA, implementing new technology or dealing with ever-changing regulations. They seek the freedom of an RIA platform, but they also have direct business or a handful of legacy clients that fit more in a brokerage solution. They need a hybrid solution, but the big broker-dealers make it too expensive and cumbersome.

That's why we're creating our community, a true hybrid, that enhances the growth of your RIA business while enabling broker-dealer options. Here' a quick breakdown of what we have planned:

- Cutting Edge RIA Platform
- Transparent cost and fee structure
- Flexibility in client asset management
- Additional services leading to fewer compliance and administrative roadblocks
- Business development and marketing strategies that actually work
- True independence
- Larger and flexible choice of technology
- Keep your Brand you have already built, create a new one, or use ours

STRATEGIC PARTNERSHIP

- ✔ Cutting Edge RIA Platform
- ✔ Comprehensive Compliance Services
- ✔ RIA Friendly Broker-Dealer
- ✔ State of the Art Technology Solutions

STRATEGIC PARTNERSHIP + ASSET MANAGEMENT

Rockport has created and manages its own model portfolios. Affiliated advisors will have the ability to use our current models or we can build them for you to achieve your specifications.

CUSTOMIZED ALLIANCE

- ✔ Join our Strategic Partner ship and then choose from other Rockport services.
- ✔ Automated Investment Platform for Smaller Accounts
- ✔ Subscription-Based Financial Planning Solution
- ✔ Marketing and Business Development
- ✔ Website(s) and Social Media Services
- ✔ Succession Planning

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