



# TOP 10 REASONS TO JOIN CANTELLA

We are always on the lookout for entrepreneurial advisors who want to give their clients the very best service and grow their business accordingly. If this sounds like you, here are 10 reasons you should think about joining Cantella.

## 1. Everyone knows your name

At Cantella, each advisor is important. We learn what you need, where we can help, and care about how things are going. You will have the **direct** phone number for every employee, including senior management.

## 2. Our growth depends on yours

The better you do, the better we do. We provide the tools and resources you need to help you reach your defined level of success. A public relations firm is available to increase your media coverage and help build your brand. Advisors receive business building and practice management ideas daily from Horseshmouth, monthly development calls, and access to numerous coaching and marketing solutions.

## 3. A simple compensation formula

Forget payout grids. Established producers receive a 90% payout on all products and services (less transaction costs), except for traditional insurance where you keep 100%. For a very low monthly fee, we pay for your registration in 4 states, cover your annual SIPC assessment, compliance visits, provide on-line account access for your clients, plus PR and marketing assistance. You will also receive technology support including anti-virus and encryption software, digital document storage, and access to a live tech-support hotline. We'll help you buy the right tools for your business at the right price.

## 4. A flexible, powerful clearing platform

You can build your business around our ability to carry accounts with three of the top clearing firms in the industry. Having access to Pershing LLC (a BNY Securities Group Company and subsidiary of Bank of New York Mellon), National Financial Services LLC (member NYSE/SIPC), and Raymond James & Associates means you can provide powerful research, ideas, products, and services to help your clients.

## **5. We don't leverage technology, we create it**

We didn't buy our IT systems off the shelf. We built them from scratch to provide solutions based on the suggestions of our financial advisors. We help you work smart, creating more time to focus on what is important – your clients.

## **6. An intelligent, well-trained support staff backed by streamlined systems is here to help you**

Most employees have their Series 7 and 24 licenses. They are cross-trained to help answer questions on the first call. You can access the status of your request on-line or speak directly to any employee. We are here to ensure questions are answered promptly to help you meet the requirements of your clients and regulators without sacrificing your day to pushing paper.

## **7. Compliance is here to help**

The regulatory environment has changed. You own a valuable practice and need to protect it not just from lawsuits, but also from a regulatory perspective. Our proactive approach delivers informative, understandable, useful advice and peace of mind. We will help you analyze your operations and provide the tools to build an effective compliance system without draining your resources. Response to questions and turnaround on advertising and marketing material happens quickly at Cantella.

## **8. We help you get back to generating revenues quickly**

Our transitions department is laser-focused on getting you back into full production as soon as possible. We know the steps to moving a book and track them with you. We prepare you before the move, minimize headaches while transferring assets, and then help you grow forward.

## **9. You don't just join a firm, you join a family**

Our family culture and focus on maintaining personal relationships goes beyond our dedication to excellent service. Vin Cantella, our founder, would never let us forget that it is the people that make a business. You become a part of something special that is worth celebrating when you join Cantella.

## **10. Greater Independence**

We don't tell you what to market. We only ask that you do what is best for your clients. The pressure to generate more revenues comes from you, not us. We are here to help you achieve your goals and objectives. You let us know where you want your business to be and we will help you make it a reality. Please call Jim Freeman at (617)224-1408 with any questions.