

2025 DISTRIBUTION AND MARKETING CONFERENCE

Shaping Our Future

**Building a Strong
Foundation: Firm and Home
Office Infrastructure for
Advisor Success**



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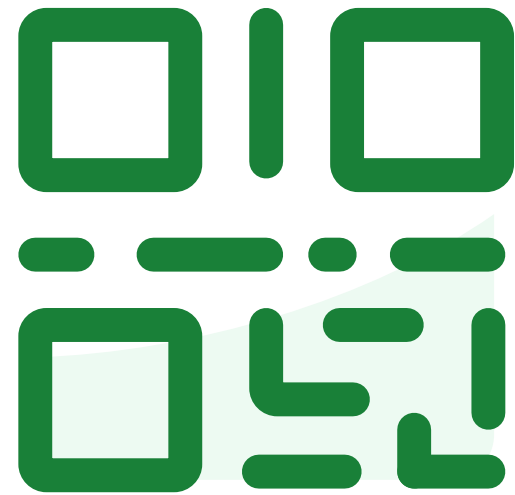


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How would you define your infrastructure?

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What word do you associate with a centralized model?

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How long has your firm operated in its current infrastructure model?

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Distribution Functions

- Advisor recruiting
- Marketing
- Client lead generation
- Advisor learning and development
- Wholesaling
- Case design support
- Teaming support
- Practice management or business consulting
- Technology

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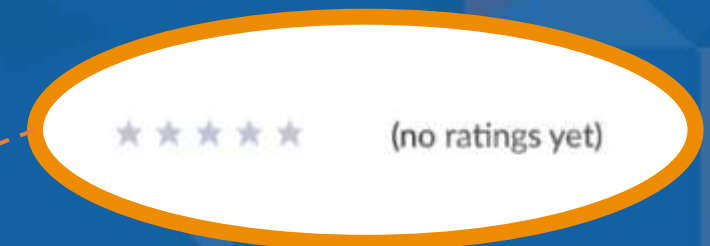
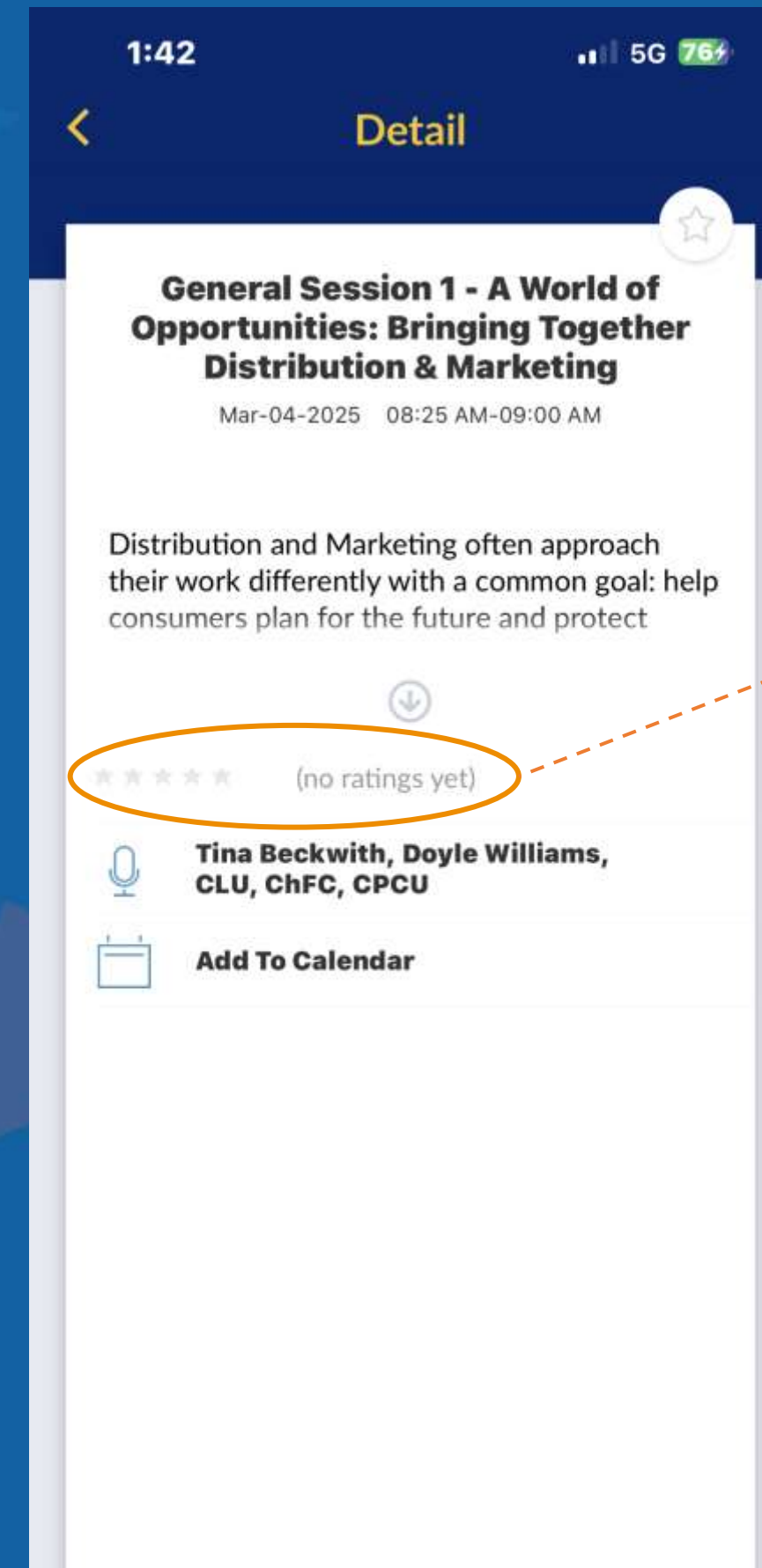
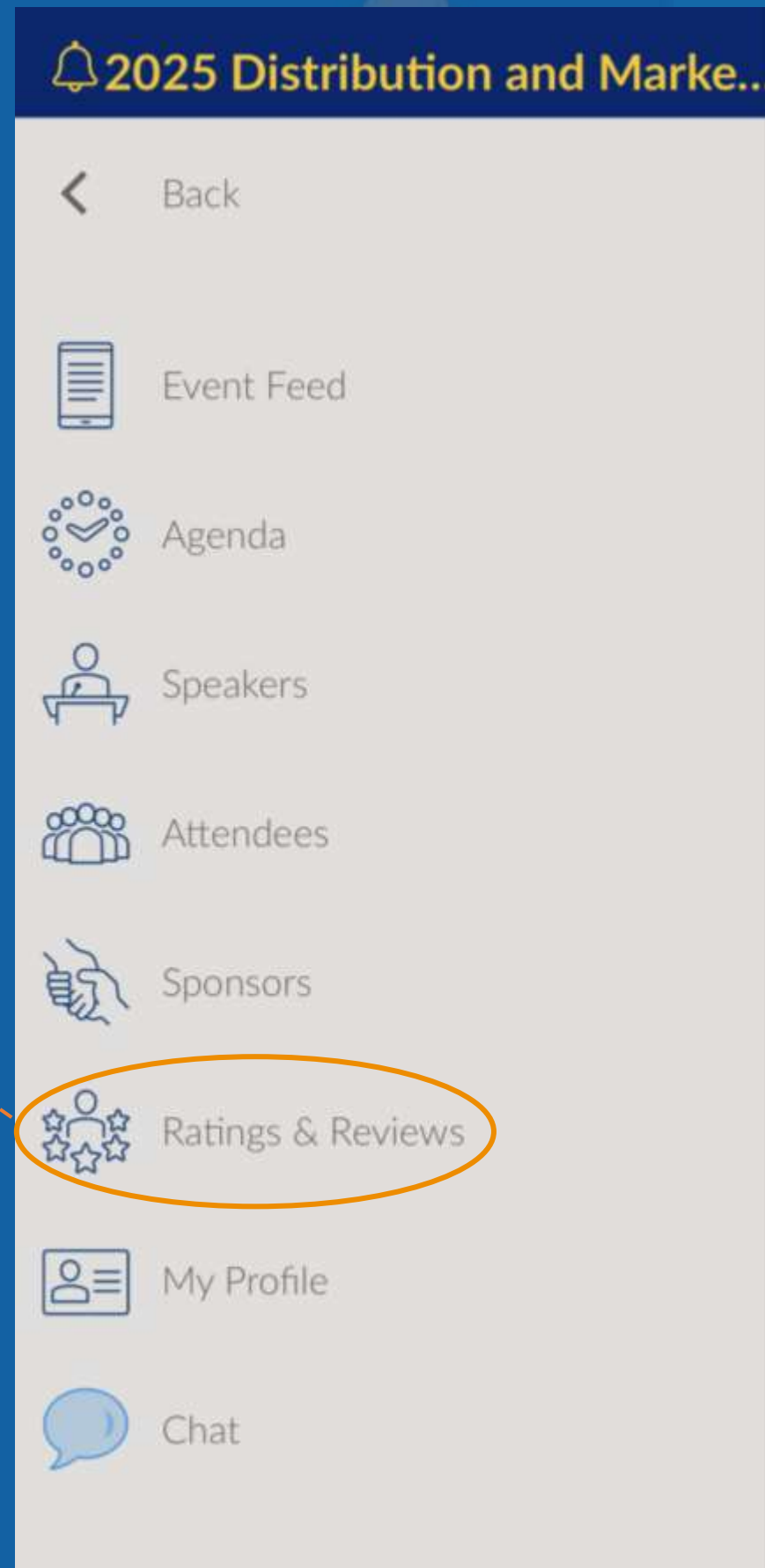
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Audience Q&A

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