PRIVATE ADVISOR GROUP

REGISTERED INVESTMENT ADVISOR

As members of **Private Advisor Group**, a nationwide network of leading financial advisors, we receive **personalized service, vigilant risk-management** in the form of **compliance** and **supervisory oversight,** and access to a **community** of like-minded advisors with whom we share best practices. In addition, Private Advisor Group leverages the technology, trading, custodial, and clearing services of LPL Financial, the number one independent broker-dealer in the industry.*

LPL Financial

SCALE & CORE SERVICES

Integrated technology platform
Trading and clearing
Data management and reporting
Practice management support
Monthly statements

PRIVATE ADVISOR GROUP

VALUE ADDED SERVICES

Comprehensive service
Dedicated transition team
Compliance and supervisory oversight
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Quarterly performance reports
Built-in succession plan
Tight knit community
Practice growth support

**As reported in* Financial Planning *magazine, 1996-2018, based on total revenues.*

65 Madison Avenue, Suite 300, Morristown, NJ 07960
Tel (973) 538-7010

www.privateadvisorgroup.com

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