EDELMAN
WEALTH MANAGEMENT GROUP

LET US HELP YOU REACH YOUR DESTINATION

destination

noun | des·ti·na·tion

1. the ultimate end or purpose for which something is created or a person is destined

Your Goals. Our Support

EDELMAN
WEALTH MANAGEMENT GROUP

What's Your Destination?
It's not just a question we ask our clients. It's a question we ask our partners and ourselves.

EDELMAN
WEALTH MANAGEMENT GROUP

LOOKING FOR YOUR NEXT OPPORTUNITY? EDELMAN WEALTH MANAGEMENT GROUP IS SEARCHING FOR STRONG, ENTERPRISING ADVISORS TO JOIN OUR TEAM.

ARE YOU A FINANCIAL · EMPLOYEE BENEFITS · PROPERTY & CASUALTY ADVISOR?

THE EDELMAN ADVANTAGE

1 DIVERSIFIED PRODUCTS

INDEPENDENCE WITH AN OPEN PRODUCT PLATFORM THAT INCLUDES A COMPREHENSIVE RANGE OF INVESTMENT, ADVISORY AND PROTECTION PRODUCTS FROM LEADING CARRIERS

2 DATA ANALYTICS

ACCESS TO EDELMAN WEALTH MANAGEMENT'S DATA-DRIVEN ANALYTICS AND CRM SYSTEM TO HELP IDENTIFY CROSS-SELLING AND OTHER OPPORTUNITIES WITHIN YOUR BOOK OF BUSINESS

3 OPERATIONAL SUPPORT

RESOURCES TO SUPPORT THE GROWTH OF YOUR BUSINESS, INCLUDING DEDICATED PRACTICE MANAGEMENT SUPPORT AND ACCESS TO ADVANCED PLANNING RESOURCES

4 FOCUS ON GROWTH

PARTNER WITH EDELMAN WEALTH MANAGEMENT GROUP ON GROWING YOUR PRACTICE AND THE FIRM

THE EDELMAN PHILOSOPHY

Your Goals. Our Support
What's Your Destination? It's not just a question we ask our clients. It's a question we ask our employees, our partners and ourselves.

Edelman Wealth Management has been working hard since 1996 to make sure that we can service our community with uncomplicated advice and unparalleled service. Our team mission guiding people to their lifestyle and financial goals has helped us build our wealth management company.

WANT TO KNOW MORE?

EMAIL US AT INFO@EWMGINC.COM OR GIVE US A CALL AT 215-579-5601

EDELMAN
Wealth Management Group

THE EDELMAN ADVANTAGE

Open Product Platform For Your Clients' Needs

1 DIVERSIFIED PRODUCTS

Independence with an open product platform that includes a comprehensive range of investment, advisory and protection products from leading carriers

It's all about doing what's best for your clients. Offering objective guidance to help them protect what they have today, provide for loved ones tomorrow, plan for the future, and prepare for the unknown. Access top-quality, products from leading carriers so you can always recommend the product that best meets each client's needs.

Protection – Access industry-leading products from some of the top insurance providers.

Life   Long-Term Care   Medical   Disability

Wealth – Access a comprehensive investment platform to help meet your clients' wealth management needs.

Individual /Group Retirement Plans	Annuities
Mutual Funds	Brokerage Accounts
Alternative Investments	529 College Savings Plans

Corporate RIA – Access a range of industry leading programs, including professional money management platforms with customized investment strategies & financial planning resources.

Group Benefits – A comprehensive platform covering a wide array of products to support individuals and small businesses.

Medical	Dental and Vision
Group STD and LTD	Group Life

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THE EDELMAN ADVANTAGE

2

DATA ANALYTICS

ACCESS TO EDELMAN WEALTH MANAGEMENT'S DATA-DRIVEN ANALYTICS AND CRM SYSTEM TO HELP IDENTIFY CROSS-SELLING AND OTHER OPPORTUNITIES WITHIN YOUR BOOK OF BUSINESS

DATA ANALYTICS TO DRIVE YOUR BUSINESS

At Edelman Wealth Management we have a robust CRM system with built-in processes to help streamline your practice and make it more efficient by automating some of your day-to-day work.

We believe it all begins with having the right data at your fingertips to help you identify opportunities within your business such as:

Cross-Selling
Multi-Generational Planning
House Account Management and follow up
…And more

Additionally, the system is integrated with client data from a leading aggregation tool, which means that you have up-to-date account balance information at your fingertips.

Finally, take advantage of our pre-defined client segmentation model that is built into the system. This will allow you to stay in touch with your clients and ensure you are giving them the personalized service they expect. We will work with you to load your clients into the system and put them through our process. We will also help you review and adjust them on an annual basis.

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3

OPERATIONAL SUPPORT

RESOURCES TO SUPPORT THE GROWTH OF YOUR BUSINESS, INCLUDING DEDICATED PRACTICE MANAGEMENT SUPPORT AND ACCESS TO ADVANCED PLANNING RESOURCES

THE SUPPORT YOU NEED TO GROW YOUR BUSINESS

Our Practice Management support will help you examine the core components of your business and optimize them so that you are set up to achieve client satisfaction and business success. It all comes down to People, Process, Technology.

People

For a practice to be at its best, it is essential that the right people are doing the right things at the right time. We will help you develop a team to support you and your clients' day-to-day needs so you can focus on building your business.

Process

Successful advisors tend to have well-defined processes in place, enabling them to better manage their time. They set time aside to work on, not just in, their practice. Using our processes, we can help free up your time to get you focused on growing your business.

Technology

Using technology in your practice can give you and your clients the ability to work together from anywhere, at anytime, reduce mistakes and missed opportunities, and help streamline your practice.

Planning Resources

We can help you design and strategize your cases. This includes working with you to determine the most appropriate solutions and products, while accessing the right tools and resources.

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THE EDELMAN ADVANTAGE

FOCUS ON GROWTH

Partner with Edelman Wealth Management Group on growing Your Practice and the firm

A True Partnership for growth

Our goals are lofty. We are looking for the right advisors to help identify game-changing areas of growth, including developing additional high net-worth markets or acquiring practices.

As a team, we help our clients define and prioritize their goals and dreams by developing individually tailored strategies. Using our Financial Destinations process, we examine cash flows, educational funding needs, retirement expectations and estate planning concerns in order to deliver comprehensive financial solutions.

The Firm has developed a platform that allows us to deliver a complete range of targeted financial solutions, investment services, insurance products and employee benefit plans consistent with the clients' time horizons, risk tolerances and overall financial objectives.

As the industry evolves, our Firm grows through continuing education, thought provoking ideas, leading solutions and additional specialists we bring to our clients and team.

Our entire operation is coordinated through best of breed technology and processes, all which are designed to achieve the best client experience possible.

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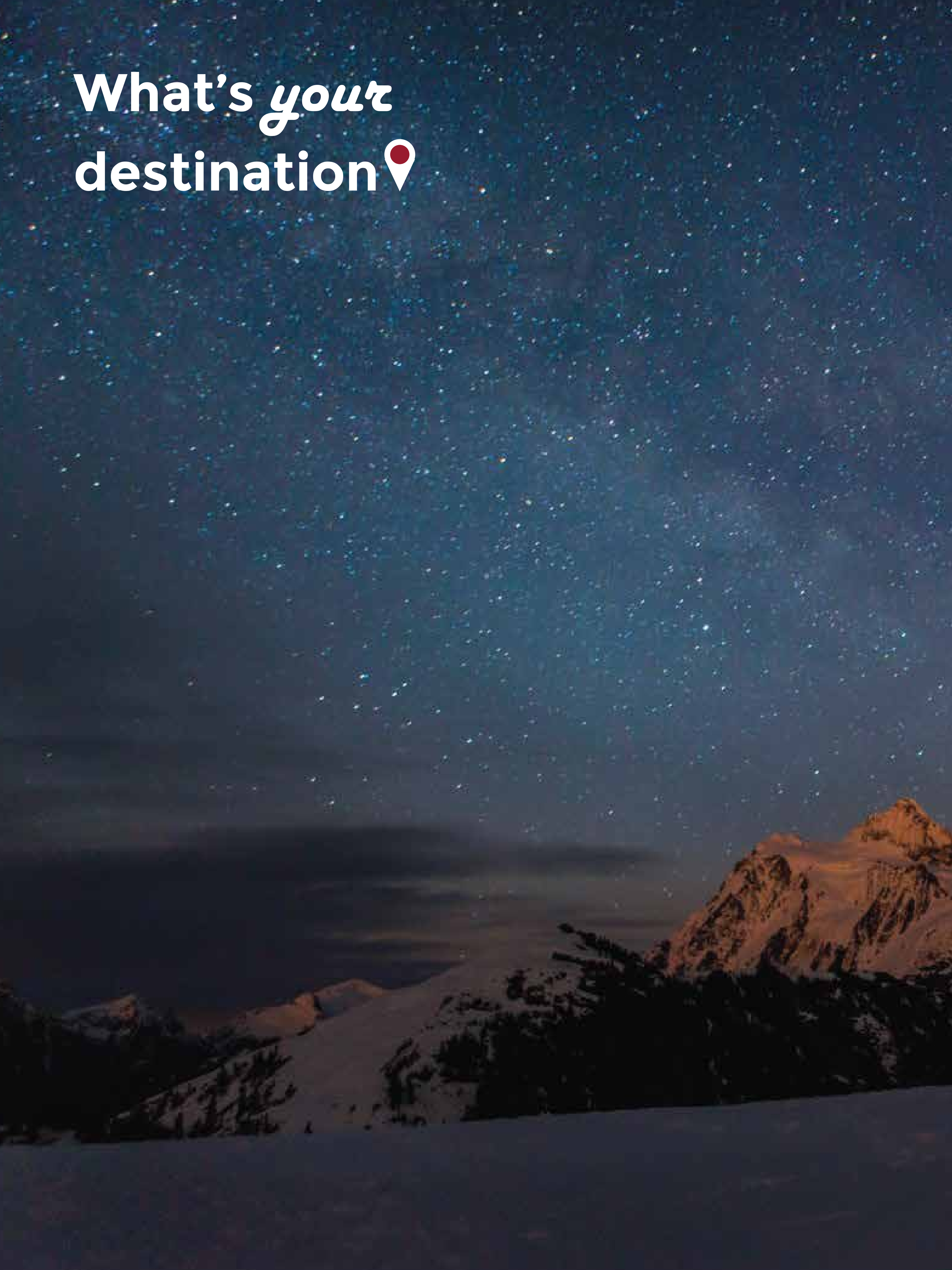
What's your
destination

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We are strongly committed to diversity and equal opportunity