

Why Wait to go Independent?

The independent advisory model provides a spectrum of flexibility, growth potential, and freedom that appeals to many financial advisors. Even so, the structure, support, product selection, and sense of community, like the independent broker-dealer model, continue to resonate with many financial professionals. Ultimately, it all comes down to the level of independence that an advisor believes achieves the needs of the practice and clients' needs. Do you have an entrepreneurial mindset of building a practice or choosing another affiliation model that still provides a level of independence but without added risk?

The reasons for going independent are plentiful. In a recent survey¹, nine out of 10 breakaway financial advisors cited these top three reasons for their move to independence: Greater autonomy of building your practice, higher payouts and the ability to build enterprise value of your firm.



Determine the “Why?”

The decision to embark on a path to independence is a personal one. Why are you considering making a transition? What needs are you hoping to address in your current practice? Are you seeking an all-in-one transition, or do you have the patience to gradually evolve your business over time from one affiliation model to another?

There is a lot to consider when making a transition. It's multi-faceted, but the rewards, both personal and financial, can be great. Ultimately, advisors considering a move need to consider what motivates them, which will help determine the best path to take.

When establishing an independent advisory practice, there are multiple models to choose from, depending on your strengths, vision, where you are right now, and where you want to be in the future.

Do you want to form your own RIA with abundant responsibility and costs, but enjoying complete freedom and control?

Do you want to operate like an RIA with turnkey infrastructure and back-office support functions giving you more time to focus on more revenue-producing activities and taking on less risk?



Vision and Culture: Build a firm based on your beliefs and vision and deliver exceptional service on your terms.

Control: Manage your work/life balance on your terms. Decide which products, services, and platforms best meet your needs-and those of your clients.

Compensation: Seek potentially higher payouts while keeping cost structures low.

Create Value and Monetize Your Life's Work: Maximize the value of your RIA through your value proposition, client mix, revenue diversification, organization, and overall cost structure.

Build a Legacy: Create an enduring business model with a clear succession plan that ensures what you have built remains after you retire.

Advisors Who Embark on Independence Wish They Would Have Done It Sooner

Key benefits you can expect are increased efficiency and productivity, improved scalability, reduced risk, improved investment capabilities with the option of outsourcing, succession and business continuity solutions, and higher payouts.

Don't wait another day to run your own business rather than a practitioner – [Adhesion Connect](#) empowers advisors with enterprise-level resources allowing you to stay autonomous. Your firm, your way, with a stable long-term infrastructure with an RIA Enterprise relationship that best fits your practice.

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