



Services for Registered Investment Advisors (RIAs)

When advisors make the decision to go independent, they often underestimate the complexities involved. Overnight, they go from managing a group of clients to owners running a business as well. We have helped advisors overcome transition hurdles, including:

- Business Plan Development
- Practice Creation and Management
 - o Defining infrastructure needs
 - o Creating job descriptions
 - o Hiring employees
- Systems Selection / Integration
 - o Back Office
 - o Compliance / Risk
 - o Investment Platform
 - o Software
 - o Reporting / Reconciliation
- Marketing and Branding
 - o Corporate Identity Packages
 - o Web Design
 - o Collateral Creation
 - Marketing Pieces
 - Recruiting Pieces
 - Client Presentations
 - Prospecting Letters
 - o Referral Programs
 - o Client Loyalty Programs

These services are also appropriate for existing organizations looking to further distinguish themselves. With so many assets in motion today, it is more important than ever to separate yourself from the competition. Our open architecture menu of services allows you the flexibility to choose only the services you need.

AK Advisory Partners is a consultancy to the financial services industry, providing advice and training to firms and individuals in the fee-based, investment management and wealth management areas.

Our Principals have gained in-depth knowledge of the banking, brokerage and investment management businesses during their successful careers and varied roles at preeminent small, midsize and large companies. They have developed an adaptable mix of mentoring, problem-solving and communication skills and a strong network of industry contacts and resources. They also have reputations for decisiveness, honesty and fairness.

AK Advisory Partners LLC is committed to listening to clients and collaborating to help meet their objectives. Our credibility rests on open and honest communication and on delivering the unparalleled service that clients expect and deserve.

Please give me a call to discuss how we can partner for success.

**Andy Klausner, Founder and Principal
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