AK ADVISORY PARTNERS LLC
Unlocking Real Value

AK Advisory Partners offers a full range of consultative and training solutions designed to address challenges and unlock real business value along three distinct, but complementary, service lines:

Strategy

- Product + Platform Development
- Distribution Strategies
- Competitive Positioning
- Branding Initiatives
- Sales + Marketing Campaigns

Structure

- Merger Integration
- Process Improvement
- Change Management

Training

- Executive Coaching
- Client Seminar Design
- Proprietary Certification Programs

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

Unlocking Real Value

Change. Resiliency. Two words - two concepts - that come together as hallmarks of today's financial services market and your everyday business dealings.

To keep a competitive yet profitable edge as service providers and long-term partners with your clients, it is important for you to understand rapidly changing industry trends and respond with prudent, flexible and practical strategies. We consult to:

- Sponsor Firms (Brokers/Dealers, Banks, Insurance Companies)
- RIAs
- Investment Management Firms
- Financial Advisors

AK Advisory Partners understands today's challenges and the issues you face. Our mission is to help you navigate today's market landscape and regulatory environment by bringing efficiency and innovation to your business structures, offerings and practices. **Unlocking real value means helping clients grow their businesses, solidify their brands and meet their strategic objectives.**

Our ability to add value to your business rests on three core competencies:

Knowledge & Experience
We have extensive and diverse industry experience and have developed deep industry relationships which supplement the perspective we bring to our work.

Independence & Objectivity
As an independent organization we answer solely to our clients. This provides us a unique level of objectivity and allows us to provide invaluable candor and honesty.

Client-Focused Solutions
Each client relationship is treated uniquely, assuring that we address distinctive needs and circumstances.

Andrew Klausner, CIMA, CIS

Andy has worked in the financial services industry for more than 25 years. In that time, he has been affiliated with leading banks, brokerages and financial advisory firms across the United Sates. He founded AK Advisory Partners to help clients navigate today's challenging market landscape and regulatory environment by bringing efficiency and innovation to their business offerings and practices.

Andy started his career at Townsend-Greenspan Inc., the firm founded by noted economist Alan Greenspan. There, and in subsequent early employment at Lehman Brothers, Andy honed his analytical skills on the research side of the business. As he evolved professionally, his focus changed to investment management consulting, where he concentrated in the areas of marketing, sales and client service at firms such as UBS and Salomon Smith Barney. Having forged a strong foundation of business experience and skills, Andy next took on more expansive roles including product development and management, department building and change management in a variety of industry settings, including Morgan Keegan and Janney Montgomery Scott on the brokerage side and CCO Investments on the banking side.

Andy holds an BA from the University of Michigan and an MBA from New York University. He speaks frequently at industry conferences, including the Investment Management Institute. He is a former member of IMCA's Advisory Council and he has held the Series 7, 9, 10, 24, 63 and 65 licenses.

"Our core mission at AK Advisory Partners is to collaborate with clients to develop and implement strategies to unlock real value in their businesses. Our principles are clear: open communication, full transparency and an uncompromising dedication to surpassing client expectations."

www.akadvisorypartners.com

According To Our Clients...

"We hired Andy to help us develop an alternative investments platform. We were on a very short time-frame, and Andy was able to complete the project on time and to our specifications. His style was very collaborative – he was able to coordinate the many internal participants on the project and develop a consensus and a framework for moving forward. Andy communicated frequently and kept our management up-to-date so that there were no surprises. Andy is enjoyable to work with and I would recommend him unconditionally."

Cory Custer | Senior Vice President | D.A. Davidson & Co.

"Andy has played an integral role in helping us launch our RIA firm. His unique ability to listen, to embrace our vision and translate it into an understandable and deliverable message is the value-added service. From the definition of our mission statement to the content of our web site to our marketing initiatives, Andy's work is the catalyst for moving us forward. He is patient and forthright in getting the project completed right the first time, accommodating to our needs and timelines and able to work successfully with diverse personalities."

Neil F. Campbell, Jr | CEO + Founder | FUTR Family Management, LLC

"We hired AK Advisory Partners to assist us in rebranding ourselves and developing a marketing strategy. The engagement included creating a new brand identity and identifying our unique and distinguishing characteristics. They also rewrote our web site and marketing materials to reflect our new direction and corporate identity. Throughout the engagement, they were always available, completed assignments on a timely basis and were willing to go the extra mile for us. I can honestly say that they exceeded my expectations, which is a hard thing to do."

Mark A. Chandik | Principal | FDP Wealth Management

"We hired Andy because of his breadth of industry knowledge. Our project needed someone who understood both the operational and business sides of the managed accounts business. Andy was successful in leading us through a difficult conversion. He also documented the process so that future conversions will go more smoothly. I highly recommend him as a consultant to others seeking solutions to complex wealth management problems."

Michael J. Griffith | Senior Vice President | Bank of America

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