

We Believe in the Three C's:



Community so you never build alone.

Collaborate so strategy becomes shared execution.

Cultivate so your practice grows intentionally and sustainably.

Our role is simple — to be the partner that helps you move further, faster. By Design.

Community.

An advisor community where ideas & best practices are shared — not siloed.

- Weekly Group Touchpoint
- Networking Events
- Annual Advisor Conference
- Study Groups & Workshops
- Vendor Partner Conferences
- Annual Awards & Recognition
- Women's Initiatives
- NextGen Collaboration
- Community & Charitable Engagement

Collaborate.

We go further together!

- Succession Planning (Buyers)
- Succession Planning (Sellers)
- Continuity Planning
- Business & Practice Management
- Annual Practice Reviews
- Client Experience— Insurance Division
- Recruiting & Talent Sourcing
- Internship Opportunities
- Sales Development

Cultivate.

We're committed to your long-term growth!

- Comprehensive Product & Carrier Offerings
- Operations Support & Training
- Onboarding
- Holistic Planning & Multi Lines Support
- Compliance/Supervision
- Licensing & Registration Support
- News & Content Distribution
- Marketing Initiatives
- Technology Training & Resources

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MSF Branding Updated Names/Terms

Advisor Connections. By Design:	Weekly branch touchpoint Monday's, 2:00pm ET
Weekly Industry Summary:	Weekly newsletter from BGA Wednesday's
Supervision News:	Monthly newsletter from Compliance & Supervision, first Friday
Investment Strategy & Growth Council:	Monthly study group, third Thursday, 11:00am ET
Advisor Growth Summit:	Inaugural event May 11-13, Carmel, IN INVITATION ONLY
Advisor Collaboration:	Annually. Next meeting February 24-26, 2027. Synergy by the Sea.
Brand Ambassadors:	Team responsible for the branding & marketing output from the firm.
Relationship Managers:	Business development team, tasked with deepening advisor/MSF relationships.