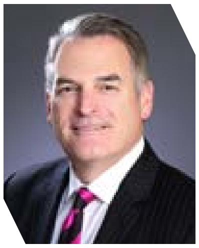
WOODBURY FINANCIAL
Member of Advisor Group

PERSONALIZED REGIONAL SUPPORT.

FINANCIAL ADVISOR USE ONLY.

A MESSAGE FROM OUR PRESIDENT.



Why consider Woodbury Financial Services? Because our firm is different.

At Woodbury Financial, we act as a home office OSJ, taking on the supervisory burden, so you can focus your time and energy on growing your business.

Our Regional Vice Presidents provide local resources to help you succeed in everything from implementing new technologies to acquiring new clients.

Our deep expertise in wealth management, financial protection and guaranteed solutions allow you to address the full scope of your clients' needs, today and for the rest of their lives.

Please take a closer look at Woodbury Financial and discover how we empower individuals and offices to become exactly what they envision. I invite you to experience a unique environment where you can thrive. Being different changes everything in today's world. Please call and let's talk.

Sincerely,

Rick Fergesen
PRESIDENT & CEO
WODDBURY FINANCIAL SERVICES, INC.

Woodbury Financial by the Numbers*

1968
FOUNDED**

1,100
ADVISORS

120%
ADVISORY GROWTH

97%
RETENTION RATE

800+
EMPLOYEES†

$226,000
AVERAGE GDC/ADVISOR

$39 B
CLIENT ASSETS

13
NUMBER OF RVPS

* As of 12/31/17. ** Although Woodbury Financial was founded in 1968, we have roots dating back to 1910.
† Includes shared back office services within Advisor Group.

REGIONAL SALES SUPPORT

We provide Regional Vice Presidents who work closely with advisors from the time they consider joining us and then throughout their careers. The RVP's job is to bring the entire resources of the firm to advisors to help them achieve their goals.

On the Ground Support

It begins with a unique three-dimensional system that includes local field leaders, a regionalized support team, and service that is top-tier. By providing proactive and comprehensive product support, we've helped advisors like you realize their vision of business growth and efficiency year after year.

We do this by having boots on the ground right where you live and operate. We get to personally know you and your practice in order to help you partner with industry resources, develop business contacts, and forge strategic alliances. This includes regional training and networking opportunities and practice strategies that can help increase your revenue stream and build your bottom line.

Access and Resources

Woodbury Financial also provides you with internal sales support through the Sales Desk and the Advanced Sales and Qualified Plans team. This two-tiered structure provides you with solution-driven, product-agnostic resources to rely on for assistance across the spectrum—from simple product recommendations to intricate case design. Together, this group includes experienced professionals who average more than 20 years of experience in the financial services industry, delivering practical, effective input.The bottom line is that we put our advisors first with real people delivering real solutions. If you are considering a change of broker-dealers, we invite you to put Woodbury Financial on your short list.

23 Years
AVERAGE RVP INDUSTRY EXPERIENCE

16 Years
AVERAGE RVP TENURE

12.5%
AVERAGE TERRITORY GROWTH (2017)

INTELLIGENT TECHNOLOGIES.

Innovation that elevates the advisor—and client—experience every step of the way: it's an ongoing process requiring the commitment and resources of a firm like Woodbury Financial. A few of our offerings:

Advisor Portal

An online, integrated platform that puts all business and practice management tools in one place:

OFFICE AUTOMATION SUITE	SUPERVISION/ COMPLIANCE	CLIENT MANAGEMENT/ SERVICE SOLUTIONS	BUSINESS TOOLS
Powerful resources to deliver a new level of efficiency to your office management activities, creating a paperless experience.	Integrated solutions to manage form submissions with a supervisory workflow, allowing for first line supervisors to review advisor activity.	Simple tools to access all of your client management resources in one, comprehensive view.	Efficient instruments to manage your practice, leaving more time to serve your clients and build your business.

Advisor Business Intelligence

An advanced reporting platform that gives you insights beyond traditional reports and helps you identify your clients' unique needs, cross sell opportunities and ideas on how to maximize profit across your entire book of clients.

Integrated Customer Relationship Management Platform

Our open architecture platform lets you choose the CRM platform best suited to your specific needs—with the opportunity to select an option that is integrated with our Advisor Portal intranet.

Paperless Office

A flexible, web-based document/image management and workflow system allows you to easily archive, access and share information. Store and retrieve client, accounting, HR, operations and associated persons' folders.

STREAMLINED ADVISORY SOLUTIONS.

WE'VE GOT THE PLATFORM

Our state-of-the art Wealth Management Platform (WMP) integrates the products, trading, research and business tools fee-based advisors need to thrive in an evolving industry:

State-of-the-Art Business Tools

- Proposals
- Account set up and paperwork
- Research
- Trading/Rebalancing
- Portfolio analysis
- Reporting
- Online investor access
- Fee billing

Institutional Class Investment Products

- Advisor Managed Portfolios (AMP)
- Model Portfolios managed by multiple investment strategists
- Separately Managed Accounts (SMA)
- A dynamic Unified Managed Account (UMA) solution

WE DELIVER THE TANGIBLE SUPPORT YOU NEED

Looking to introduce an investment advisory relationship to clients? Our Accelerate with Advisory program equips you to build your fee-based practice and includes a licensing/registration education and reimbursement program.

New to advisory, or a tried and true veteran? In the field, on the phone, or online, we're equipped to provide you with service that elevates your practice. Our internal specialists work with the firm's regional field consultants to cover all the bases. We're there for you… wherever you may be.

EXCLUSIVE MARKETING TOOLS.

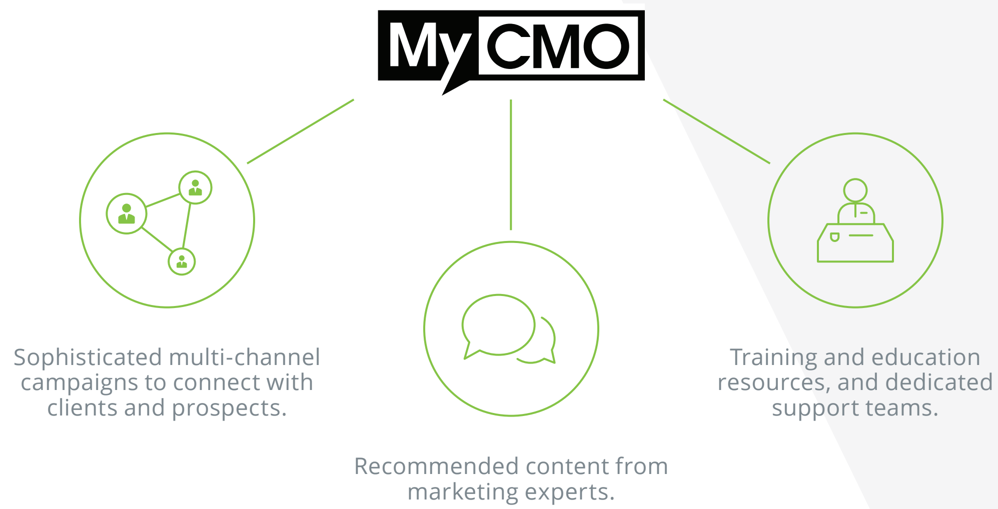
You bring a lot to the table... do you have a way to share it broadly with clients and prospects? At Woodbury Financial, we make it easy to get your message out. Our offerings include:

Expert Advisor Marketing Consultants

Our team of in-house marketing specialists is available for one-on-one consultations. When it comes to creating or enhancing a marketing plan, our advisors don't need to go it alone.

MyCMO

Promoting your business? MyCMO is a multi-channel communications platform that lets advisors manage different marketing activities, including email newsletters, social media, client events and seminars, firm and client collateral, business stationery, cards, branding and webpage design, all on one intuitive site.



Marketing Education—MarketingU

MarketingU is a curriculum-based program that helps advisors of all skill sets elevate their marketing. Resources include live webinars, videos, tutorials and how-to guides.

TOGETHER, WE CAN ACCOMPLISH GREAT THINGS.

At Woodbury Financial, we champion independent financial advisors by offering the robust resources and personalized attention needed to thrive today and well into the future.

Woodbury Financial and its advisors capitalize upon the synergies created by common goals and a shared focus on integrity and achievement. Because we are in your corner, we are excited about your success and as committed to it as you are.

We'd love to speak with you in the future... about your future.

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EMAIL

joinwoodbury.com
WEBSITE

FINANCIAL ADVISOR USE ONLY.

Securities and investment advisory services are offered through Advisor Group, Inc. subsidiary, Woodbury Financial Services, Inc., broker-dealer, registered investment advisor and member of FINRA and SIPC.

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