WOODBURY FINANCIAL
Member of Advisor Group

WHY WOODBURY FINANCIAL?

SOLUTIONS, SERVICE AND SCALE THAT SUPPORT YOUR VISION.

1. We solicit—and act upon—advisor feedback. Our four advisor committees help formulate Firm initiatives.
2. We offer some of the highest published payouts in the independent space.
3. Our state-of-the-art advisory platform supports Advisor Managed Portfolios, and offers SMA, UMA and Model Portfolio Strategist options.
4. Our technology suite includes paperless solutions, business analytics, CRM integration, a marketing library, an end-to-end digital new account opening platform, and more.
5. Our value-add programs, including Women Forward, My Succession Plan, Essential Advisor, My Business Builder, Accelerate with Advisory, and MyCMO platform.
6. Robust education and training delivered in person, via online sessions or on demand.
7. Networking opportunities at our annual ConnectED national education conference and Zenith top advisor meeting.
8. Dedicated business development support, including coaching programs.

BY THE NUMBERS*

1968 FOUNDED**	**1,600** ADVISORS	**8 years** AVERAGE RVP TENURE	**97%** RETENTION RATE
900+ EMPLOYEES†	**$252,905** AVERAGE GDC/ADVISOR††	**$60.0B** TOTAL CLIENT ASSETS	**18** NUMBER OF RVPS

* As of March, 2019. ** Although Woodbury Financial was founded in 1968, we have roots dating back to 1910. † Includes shared back office services within Advisor Group. †† Average represents producing advisors with a T-12 in excess of $10,000.

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