PARTNERING WITH HFG TRUST

Having been in business for over 35 years, HFG Trust has the infrastructure in place to assist advisors in delegation and specialization. We have a strong brand and reputation in the Pacific Northwest, and we believe the next step is to develop a presence in other markets looking for partners who also seek to provide the ultimate fiduciary financial service.

HFG Trust advisors have access to a full range of entry-to-exit financial offerings for clients not offered by the majority of competitors: wealth management, trust services, 401(k) services, banking, and family office. All of our advisors have professional financial planning certifications, allowing for thought stimulation and collaborative problem solving, and our support team is experienced and well versed in various custodial platforms. More importantly, they know how to take care of people and obsessively work to provide the ultimate client experience.

Our investment approach has been established and backed by years of evidence-based market research. All of the pieces are in place for our firm to grow, and we plan to do just that by partnering with established advisors with similar goals and values. We currently have eight financial advisors servicing over $800MM of AUM. Given the differentiators we have compared to our competitors, a prospective advisor would benefit from leveraging our infrastructure to grow their business, build a reliable succession plan for clients, and create a qualified market to purchase the book of business.

THE INDEPENDENT ADVISOR

If you are a new advisor who is just beginning your financial career, you might consider yourself one of the luckiest people in the world. You have found a passion-driven industry where you have the opportunity to work with amazing people, set a flexible schedule, and enjoy unlimited earning potential. But you may have also found that you don't want to worry about processing paperwork, portfolio management, and marketing, among other responsibilities. Partnering with HFG Trust will help you double your assets under management while making sure you're spending less time on administrative tasks.

THE GROWING FIRM

You are building a great book of business and may have an established and talented support team around you, but you find the growing list of expenses troubling. The fixed costs and investments required to fuel growth can be significant and prohibitive. However, HFG Trust doesn't think those costs should prevent you from achieving your goals. Together, we can harness our technological infrastructure and industry-leading teams to support your endeavors.

THE SUCCESSION PLAN

You have built a successful business, but have not identified a suitable successor. You need a partner who can match your timeline, pay market value for your most valuable asset, and take care of the clients you have spent years nurturing. HFG Trust is your solution. We structure fair deals, whether you choose to sell-and-stay or exit from the industry, and we have the experience and services to take care of all your clients' needs.

CONTACT US TODAY

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